



To: All Members of the Strategy and Resources Committee

Dear Councillor,

STRATEGY AND RESOURCES COMMITTEE - TUESDAY, 14TH JULY, 2026 , Council Chamber - Epsom Town Hall

Please find attached the following document(s) for the meeting of the Strategy and Resources Committee to be held on Tuesday, 14th July, 2026.

5. **COMMUNITY ASSET REVIEW** (Pages 3 - 94)

This report outlines the progress made in respect of the Council's 2025-2027 Strategic Priority 4, in relation to Community Assets and Priority 7, relating to Bourne Hall Museum Service.

It provides an update on the completed Community Asset Review Phase 2 work, which focusses on the 3 key Community Assets (Bourne Hall, Epsom Playhouse and Community & Wellbeing Centre) and seeks agreement on the strategic direction for each asset, as well as approval of investment and quick wins packages.

The paper also provides an update on the Strategic Priority 4 relating to the Museum, further to a paper considered by the Community & Wellbeing Committee in June 2026, recommending an initial investment in the museum.

It also recommends combining the two workstreams , to ensure that a comprehensive and integrated approach is taken going forward, to both achieve best value and deliver a stronger offer to residents.

For further information, please contact democraticservices@epsom-ewell.gov.uk or tel: 01372 732000

Yours sincerely

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Chief Executive

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COMMUNITY ASSET REVIEW

Head of Service:	Mark Shephard, Head of Property and Regeneration
Report Author	Victoria Potts, Mark Shephard
Wards affected:	(All Wards);
Urgent Decision?(yes/no)	No
If yes, reason urgent decision required:	N/A
Appendices (attached):	Appendix 1: Capital investments and forecasts Appendix 2: Community Asset Review Appendix 3: Bourne Hall Museum Business Case Appendix 4: Museum Service Review

Summary

This report outlines the progress made in respect of the Council's 2025-2027 Strategic Priority 4, in relation to Community Assets and Priority 7, relating to Bourne Hall Museum Service.

It provides an update on the completed Community Asset Review Phase 2 work, which focusses on the 3 key Community Assets (Bourne Hall, Epsom Playhouse and Community & Wellbeing Centre) and seeks agreement on the strategic direction for each asset, as well as approval of investment and quick wins packages.

The paper also provides an update on the Strategic Priority 4 relating to the Museum, further to a paper considered by the Community & Wellbeing Committee in June 2026, recommending an initial investment in the museum.

It also recommends combining the two workstreams , to ensure that a comprehensive and integrated approach is taken going forward, to both achieve best value and deliver a stronger offer to residents.

Recommendation (s)

The Committee is asked to:

- (1) Note the updates contained within both this report and the Community Asset Review June 2026 (Appendix 2).**
- (2) Approve the strategic direction for the three key assets, namely;**

- (2.1) Bourne Hall, Ewell - development of an integrated civic and cultural hub held by a local authority, improving connectivity between the library, museum, café, events and community functions.**
- (2.2) The Playhouse, Epsom – commence preparatory transition work towards an independent charitable trust operating model, supported by targeted investment to improve flexibility, programming and commercial performance.**
- (2.3) Community & Wellbeing Centre, Ewell - partnership-led delivery model, with rationalisation of the site and consideration of future co-location opportunities where appropriate.**
- (3) Note the update on Bourne Hall Museum and approve the recommendation of the Community & Wellbeing Committee, for an initial investment of £125,000 in this financial year (Year 1) as set out in the attached business case (Appendix 3) and approve £125,000 for a further investment in year 2 that will be built into a future business case for the wider Bourne Hall, noting the requirements of the section 24 Local Government and Public Health Involvement Act 2007 direction.**
- (4) Agree to combine the workstreams supporting Priority 4 (Community Asset review) and Priority 7 (Museum Service Review) to achieve best value, best use of resources and to ensure a comprehensive and integrated approach.**
- (5) Agree a capital budget of £3m for capital investment to deliver critical works aligned to the priorities set out in the Community Asset Review, with a detailed business plan to return to the relevant Committee for approval, noting the requirements of the section 24 Local Government and Public Health Involvement Act 2007 direction**
- (6) To approve a budget of up to £80,000 to support the development of the detailed business plan for (5) above, noting the requirements of the section 24 Local Government and Public Health Involvement Act 2007 direction.**
- (7) Note a package of operational ‘quick wins’ will be delivered in line with the approach set out in the Community Asset Review, subject to resource and funding availability. Should further funding be required, this will be developed into a future funding request.**
- (8) To recommend to the East Surrey Shadow Authority that any consent required to comply with the section 24 direction be provided to any of the relevant budgetary decisions as set out above.**

1 Reason for Recommendation

- 1.1 Local Government Re-organisation (LGR) is now well underway in Surrey, with a series of workstreams moving at pace towards the 1 April 2027 Vesting Day for the new East Surrey Unitary Council.
- 1.2 The Council has a statutory obligation under s123 of the Local Government Act (1972) to achieve Best Value and make best use of its assets, as well as demonstrate financial prudence, affordability and financial sustainability. These duties and obligations remain in place until Vesting Day.
- 1.3 This paper forms part of the work to support Strategic Priority 4 (Strategic Asset Review) and seeks to put the Council's key Community Assets in the strongest position possible as the Council moves towards becoming part of the new Unitary Council. The recommendations reflect the outcome of the Phase 2 work.
- 1.4 The paper also covers matters relating to Strategy Priority 7 (Museum Service Review) following a paper to the Community & Wellbeing Committee in June 2026.

2 Background

- 2.1 The borough benefits from a varied and highly regarded portfolio of community assets, which play an important role in supporting resident wellbeing, social connection and in providing access to a range of important amenities and services.
- 2.2 At its 26 March 2026 meeting, the Strategy & Resources Committee received an update on work carried out to date (Phase 1), which included;
 - identification and high-level review of the Council's community asset portfolio, as part of a broader strategic review of the Council's assets.
 - review of the 'as is' arrangements for the three key community assets (Bourne Hall, Playhouse, Community & Wellbeing Centre).
 - Community Asset Mapping work to identify local community organisations, resources and assets already in the Borough.
 - identification of ideas and opportunities that could be explored in more detail to create a more financially sustainable business model for the three key Community Assets.
- 2.3 The Committee approved that the Phase 2 work relating to key Community Assets be carried out. Phase 2 builds on earlier work undertaken, forming part of a number of workstreams delivered in respect of the Council's Strategic Priority 4 – Strategic Asset Review.

- 2.4 A Council subsidy of circa £1.8m per annum (revenue) is currently required to maintain the operations of the three key assets. This is considered unsustainable going forward.
- 2.5 In addition to the revenue subsidy, the Council has invested significant capital sums in the assets themselves. However, the buildings will still require significant capital investment going forward. It is recommended that the priority in the first instance be investment in the fabric and structure of the building, including mechanical and electrical systems, as well as environmental improvements. Appendix 1 sets out a summary of capital spend to date and forecasted capital investment required. The forecasts will be developed and refined to form the basis of the business plan relating to the capital investment funding request (recommendation 5). These forecasted capital requirements in Appendix 1 are based on the Asset Management Strategy, which takes a long term (circa 10 year) view of likely works required. A capital investment of £3m at this time would enable early delivery of critical works, such as heating systems and related. Investment in these works is considered a priority to ensure the buildings remain fully operational, as well as reducing running costs and increasing energy efficiency. As the operating models shift and the assets are placed on a more financially sustainable footing, it is anticipated that there will be further opportunity to fund and finance future capital works as part of an ongoing asset investment programme.
- 2.6 In addition to ensuring the financial sustainability of the assets, there is also a desire to strengthen, enhance and protect the community offer to residents, in line with the Council's [Health and Wellbeing Strategy 2025-2028](#) and [Arts, Culture and Heritage Strategy 2023 - 2028](#).

3 Community Asset Review - Phase 2 update

- 3.1 The aims and objectives of Phase 2 are;
- **Strategic aim:** to continue to support the community of Epsom & Ewell through its community assets, giving residents access to services, experiences and social connection.
 - **Objective:** to create a sustainable & resilient plan for the key assets; enhancing the community offer and safeguarding them for the longer term, while preparing for transfer to the Unitary Council.
- 3.2 The key themes of Phase 2 include:
- **Finance, funding & business planning:** deliver efficiencies and increase income and funding streams.

- **Stewardship, governance & partnerships:** strengthen links with existing and/or new community organisations, as well as resourcing and scope for new partnership working.
- **Building and asset management:** spatial and development opportunities.
- **Community and stakeholder needs:** positioning the assets to better meet community need while strengthening their long-term sustainability.

3.3 A Community Asset Review for the three assets has now been completed, and a full report is provided in Appendix 2.

3.4 The report considers options for each asset to move them towards a sustainable model, which both relies less on subsidy and strengthens the offer. For all assets, the review considered opportunities to;

- increase utilisation and income generation
- strengthen partnership opportunities
- align the portfolio with future service delivery priorities
- develop a more modern, resilient and strategically coordinated offer.

3.5 It recommends a clear future direction, based on new operating models for each asset, as set out below;

Bourne Hall, Ewell

3.6 **Recommended direction:** *development of an integrated civic and cultural hub held by a local authority, improving connectivity between the library, museum, café, events and community functions.*

3.7 Bourne Hall is a unique asset and it is considered that the strongest operating model would be for it to be retained by a Local Authority (Leases and/or licences could be granted by a successor council to specific users or services to operate within the facility.

3.8 Capital investment in the structure and fabric of the building would be required to protect and safeguard the asset.

3.9 Services (including the museum and library) would be further integrated, so that Bourne Hall provides a stronger and streamlined offer to residents and users, while delivering efficiencies and commercial resilience. Local Government re-organisation presents a unique opportunity to fully integrate the library service as it will also transfer to the Unitary Council. Early discussions with County Council officers confirm they are supportive of this integrated approach.

The Playhouse, Epsom

- 3.10 **Recommended direction:** *transition towards an independent charitable trust operating model, supported by targeted investment to improve flexibility, programming and commercial performance.*
- 3.11 It is considered that the optimum operating model would be an independent charitable trust or similar. This would give opportunity for access to targeted funding, operational flexibility and efficiencies, as well as scope for a stronger cultural offer. The asset could continue to be held freehold by the Local Authority, with a lease (or equivalent) put in place, as appropriate. While a freehold transfer could be possible in the future, given the Council's adjoining landholdings (and associated income streams) at the Ashley Centre including the car park, it is likely that a Local Authority would wish to retain the freehold.
- 3.12 Targeted upfront investment aligned to the future plans for the asset would ensure that it is transferred on a sound and sustainable basis.
- 3.13 There are considered to be significant opportunities to reposition the venue as a more active all-day cultural and community destination, broadening the offer, driving up income and strengthening the financial resilience.

Community & Wellbeing Centre, Ewell

- 3.14 **Recommended direction:** *a partnership-led delivery model, with rationalisation of the site and consideration of future co-location opportunities where appropriate.*
- 3.15 A partnership-led model would create opportunities to provide an expanded integrated offer to users, with potential to link across health, community, cultural and commercial uses. This would also create scope for much stronger commercial resilience, with opportunities for different funding streams to be brought together creatively to support these important discretionary services.
- 3.16 There is considered potential to rationalise the site, such that surplus land could be released for other uses, with potential for both a capital receipt and cost savings. The retained asset could be held freehold by the Local Authority, with a lease and/or partnership agreements put in place with charitable and/or community partners, as appropriate.

- 3.17 The above approach promotes a coordinated cross-asset approach and collectively, these proposals represent an opportunity to safeguard important community infrastructure, while creating a more financially sustainable and strategically aligned portfolio of assets for the future. Mindful of the changing shape of the Local Government landscape, it recognises that these assets will sit within a wider portfolio of community assets covering the new Unitary area. This will present further opportunity to drive efficiencies and deliver a strengthened and integrated offer to residents and the proposals set out in this paper would seek to support that future alignment.

4 Museum Service Review

- 4.1 In line with Strategic Priority 7, work has also been carried out to consider the future of the Museum. The Museum is situated in Bourne Hall and forms an integral part of the offer and is therefore considered as part of this paper.
- 4.2 In June 2026, the Community & Wellbeing Committee considered a paper setting out options for the future of the service. The Committee resolved to *Invest in Improvement of the Museum, subject to a funding request and business case being presented to the July Strategy & Resources Committee, for consideration alongside the Community Asset Review and future of Bourne Hall.*
- 4.3 Initial work has been done to consider what investment is required in the Museum Service. Appendix 3 sets out the basis for an initial investment in this financial year to make immediate improvements to the Museum service, however to ensure best value and to provide an integrated approach at Bourne Hall (as proposed in this paper), it is recommended that these workstreams are now combined, so that any future investment in Bourne Hall (including the year 2 investment for the Museum) is considered on the basis of an integrated approach, for example the layout of the different uses within Bourne Hall and a single approach to the user experience. As such, it is proposed that this work and any associated funding request be built into the wider capital investment business plan, along with existing and/or future revenue resources to support the quick wins package for Bourne Hall. Integrating any proposed future capital investment and wider resource, will ensure best value is achieved and will enable a stronger offer to be delivered to residents.

5 Proposed next steps

- 5.1 A phased programme of investment, rationalisation and transition towards the new operating models is proposed, with a suggested roadmap built around three broad phases;

- **Phase 1:** establishing strategic agreement around the preferred direction of travel for the assets, alongside the development of appropriate governance arrangements and more detailed financial modelling. To include early stakeholder engagement, the development of an investment package and the delivery of initial quick-win improvements, designed to demonstrate progress, improve operational performance and build momentum for the wider programme.
- **Phase 2:** development of more detailed business cases and longer-term investment plans for each asset, including capital planning, funding applications, design development and the refinement of future operating models. This stage will be critical in establishing affordability, deliverability and long-term sustainability, while also ensuring alignment between the various workstreams across the programme.
- **Phase 3:** delivery and transformation, including capital works, service integration, operating model transitions and the mobilisation of delivery and partnership arrangements, supported by robust programme management arrangements.

- 5.2 It is proposed that the capital investment package prioritises investment in the structure and fabric of the buildings, including environmental improvements, to protect the value and performance of the assets, as well as to provide a solid foundation for any future investments in improvements and enhancements.
- 5.3 In the short term, a package of quick wins will be developed and implemented to deliver tangible benefits, create momentum and build stakeholder confidence and trust. Early actions are likely to focus on improving utilisation of spaces, strengthened promotion and income generation opportunities, where that can be achieved without significant upfront capital investment. For Bourne Hall and the Playhouse, this may include increasing community hire and events activity, expanding the food and drink offer and refreshed branding. For the Community and Wellbeing Centre, there are likely to be opportunities to expand wellbeing activities and optimise the use of existing spaces, while strengthening existing partnership arrangements. Further detail can be found in the Community Asset Plans forming part of Appendix 2.
- 5.4 If the Committee approve the recommendations as set out in this paper, it is firstly proposed to;
- implement year 1 improvements in the Museum Service as set out in Appendix 3.

- refine and implement the quick wins package for the three assets, in line with the approach set out in the Community Asset Review. Any actions that can be carried out within existing budgetary and resource framework will be implemented as soon as is practically possible. Where additional resource is required, this will be built into future budget requests.
- develop a detailed business plan for a package of capital investment to protect and safeguard the assets and ensure they are transferred to the Unitary Council on a sustainable basis, to be brought back to the relevant Committee for approval, noting the application of a section 24 direction.
- for Bourne Hall, working with the County Council to explore early opportunities to further integrate the library with other uses such as the museum.
- for the Playhouse, continue work to explore potential charitable trust models, including existing trusts that are operating in the area.

5.5 The timescales for the above will be shaped by Unitary Council decision-making timelines as well as budgetary and resource constraints, however it is hoped significant progress will be made on the above prior to 31st March 2027.

6 Risk Assessment

Legal or other duties

7 Equality Impact Assessment

7.1 Not applicable

8 Crime & Disorder

8.1 Not applicable

9 Safeguarding

9.1 Not applicable

10 Dependencies

10.1 None

11 Other

11.1 None

12 Financial Implications

- 12.1 The three core community assets currently require council support to run services, which is financially unsustainable in the medium to long term.
- 12.2 Investment is required to maintain and protect the assets, particularly in building fabric, mechanical and electrical systems and environmental performance. The report proposes:
 - 12.2.1 Initial £125,000 investment in 2026/27 for improvements to the Museum service.
 - 12.2.2 A further year 2 investment in the museum service to look at better integration within the wider Bourne Hall including the library.
 - 12.2.3 Agreement to a £3m capital investment package across the assets (subject to a full business case and approvals).
 - 12.2.4 Up to £80,000 to develop detailed business plans, financial modelling, and investment strategies.
 - 12.2.5 A programme of “quick wins” will be delivered within existing budgets where possible, with any additional funding requirements to be brought forward separately.
- 12.3 Future operating models aim to:
 - 12.3.1 Reduce ongoing subsidy requirements
 - 12.3.2 Increase income generation and external funding
 - 12.3.3 Improve long-term financial sustainability ahead of Local Government Reorganisation (April 2027).
- 12.4 However all material capital and revenue decisions may be subject to Section 24 direction thresholds, requiring approval from the East Surrey Shadow Authority where applicable.
- 12.5 **Section 24 considerations:** Please see legal comments below.
- 12.6 **Section 151 Officer’s comments:** The Council must continue to demonstrate financial prudence and best value. The proposed strategic direction seeks to address the cost of running key services and through investment looks at alternative operating models and increased income generation.
- 12.7 The proposed initial investment of £125,000, the development budget of up to £80,000, and the £3m capital programme will need to be carefully considered within the Council’s overall financial position.

- 12.8 However, members should be mindful of the potential application of the Section 24 direction, which will require external approval for certain financial commitments. We support the recommendations, subject to robust financial appraisal and governance at each stage.

13 Legal Implications

- 13.1 The Council has a statutory obligation under s123 Local Government Act 1972 to seek Best Value from its land and property assets.
- 13.2 As this report seeks to agree a strategic direction, legal implications regarding partnerships and independent charitable trust operating models have not been considered at this time.
- 13.3 **Legal Officer's comments:** Members will be aware that further to the Structural Change Order, the Secretary of State indicated that they were minded to issue a statutory direction under the Local Government and Public Health Involvement Act 2007. This is colloquially known as a section 24 direction.
- 13.4 At the time of review (24 June), a section 24 direction has yet to be implemented but it is expected that this will come into force on 7 July and hence prior to consideration of this report by members. This means that any decision which commit the spend of capital or revenue over certain limits will be caught by the s.24 direction.
- 13.5 Its purpose is to make sure Shadow Authorities have a say in decisions about arrangements that will transfer to them, helping protect their future financial and operational position.
- 13.6 The s24 direction shall require this Council to seek the approval of the East Surrey Shadow Executive to:-
1. dispose of any land if the consideration for the disposal exceeds £100,000;
 2. enter into any capital contract –
 - (a) under which the consideration payable by the relevant authority exceeds £1,000,000; or
 - (b) which includes a term allowing the consideration payable by the relevant authority to be varied;
 3. enter into any non-capital (revenue) contract under which the consideration payable by the relevant authority exceeds £100,000, where –
 - (a) the period of the contract extends beyond 1 April 2027; or

(b) under the terms of the contract, that period may be extended beyond that date.

13.7 The financial thresholds apply to all cumulative expenditure with the same supplier, organisation or individual, or for similar services, since 1 April 2025.

13.8 The s.24 direction shall apply at the point of transaction, regardless of whether a decision has already been made by this council – meaning it may apply to some decisions already taken if contracts have yet to be signed.

13.9 In relation to property, 'Dispose of any Land' includes: -

13.9.1 Any part of Land of any tenure, Mines or Minerals, on the surface or otherwise

13.9.2 Buildings or parts of Buildings

13.9.3 Easement, right, privilege, or benefit in, over, or derived from land

13.10 Therefore, granting of leases and licences and similar transactions are also caught by the s.24 direction. Any transaction caught by the s.24 directions requires the consent of those Councils that are due to be abolished next year alongside consent from East Surrey Shadow Authority.

13.11 To support business continuity, a General Consent was proposed to delegate decisions meeting certain criteria, back to existing councils, so that existing councils can continue routine activity without being required to seek individual approval each time.

13.12 The relevant general consent to those matters contained in this report are:

13.12.1 Acquisition or disposal of any land and/or property where:

the decision to acquire or dispose of the land or property was taken by the existing council prior to 3rd July; and

the disposal or acquisition will complete prior to 31 March 2027.

13.12.2 Capital contracts in relation to expenditure on a project that has been fully approved in an existing council's 2026/27 approved capital budget (for the avoidance of doubt, this does not include any budgets that are 'provisional' or 'pipeline projects').

13.12.3 Non-capital (revenue) contracts relating to the implementation of existing council decisions where:

- a. the procurement process commenced prior to 3rd July 2026;
and
- b. the expenditure is within the approved budget of the existing council for 2026/27.

13.13 The term 'commenced' means that a tender notice has been issued or a decision has been taken to call off a framework or undertake a direct award.

13.14 Members are invited to take this into account when debating the recommendations at committee.

14 Policies, Plans & Partnerships

14.1 **Council's Key Priorities:** The following Key Priorities are engaged:

- Priority 4: Carry out and complete major Asset Review
- Priority 7: Future of the Museum

14.2 **Service Plans:** The matter is included within the current Service Delivery Plan.

14.3 **Climate & Environmental Impact of recommendations:** None

14.4 **Sustainability Policy & Community Safety Implications:** None

14.5 **Partnerships:** None

14.6 **Local Government Reorganisation Implications:** The Council remains under a statutory duty to achieve Best Value and ensure services can be delivered and maintained until LGR Vesting Day on 1 April 2027.

15 Background papers

15.1 The documents referred to in compiling this report are as follows:

Previous reports:

- [EEBC 2025-2027 Strategic Priorities 3 & 4, Strategy & Resources Committee 11 November 2025](#)
- [EEBC 2025-2027 strategic priority 4: Community Asset Review](#)

Other papers:

- [EEBC Strategic Priorities 2025-2027 - Full Council 6 May 2025](#)
- [Options for the Future of the Museum - Community and Wellbeing Committee 9 June 2026](#)
- [EEBC Cultural Peer Challenge](#)

APPENDIX 1: Capital Investment to date and forecasted spend

Bourne Hall

Table 1: Capital investment to date (since 2022)

Capital Works	Completion	Cost (£)	Funding source
Patio Installation	2022	90,000	EEBC Capital Programme
Playground installation	2023	55,000	S106 funding
Solar panel installation	2024	116,000	Grant funding
Roof & Installation	2024/5	220,000	EEBC Capital Programme
Windows replacement	2025	636,000	Grant funding & EEBC Capital Programme
Trim Trail installation	2025	40,000	Community Infrastructure Levy
Total		1,157,000	

Table 2: Capital investment – anticipated future requirements

Capital works	Indicative cost (£)
Heating and ventilation replacement	1,600,00
Lodge refurbishment	360,000
Bungalow refurbishment	300,000
High level Roof covering replacement	420,000
Car park works	75,000
Lift controls replacement	120,000
Main Hall stage lighting	150,000
Colour wash external lighting	100,000
External decorations	100,000
Library toilets refurbishment	70,000
Internal refurbishment works	1,000,000
Total	4,295,000

The Playhouse

Table 3: Capital investment to date (since 2022)

Capital Works	Completion	Cost (£)	Funding source
Solar panel installation	2023/4	61,000	Grant funding
Auditorium replacement	2023/4	50,000	EEBC Capital Programme
Windows replacement	2024/5	50,000	Revenue funding
Stage & house lighting	2024/5	280,000	EEBC Capital Programme
Foyer upgrade & mezzanine floor with lift	2024/5	307,000	Grant funding
Total		850,000	

Table 4: Capital investment – anticipated future requirements

Capital works	Indicative cost (£)
Front of house toilet refurbishment	175,000

Heating replacement & air conditioning	800,000
Flat roof recovering with insulation	300,000
Pitched roof replacement	250,000
Total	1,525,000

Community & Wellbeing Centre

Table 5: Capital investment to date (since 2022)

Capital Works	Completion	Cost (£)	Funding source
Boiler replacement	2022/3	21,000	Revenue funding
Walk in freezer refurbishment	2022/3	100,000	EEBC Capital Programme
Total		121,000	

Table 6: Capital investment – anticipated future requirements

Capital works	Indicative cost (£)
Switch gear & distribution board replacement	100,000
Windows replacement	50,000
Solar Panels installation	60,000
Kitchen refurbishment	130,000
Pitched roof replacement	250,000
Total	490,000

Community Asset Review

Bourne Hall, Epsom Playhouse & Community & Wellbeing Centre



JUNE 2026

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Epsom & Ewell Borough Council is at a significant point of transition. Increasing financial pressures, changes associated with Local Government Reorganisation, and growing demand for community, cultural and wellbeing services require the Council to take a strategic and long-term approach to its community assets.

This report provides a high-level strategic overview of the future direction for three of the Council's significant community and cultural assets: **Bourne Hall**, **Epsom Playhouse** and the **Community & Wellbeing Centre**. It builds on previous operational, financial and asset reviews and sets out a strategic direction focused on improving long-term financial sustainability while protecting and enhancing community value. It seeks to increase utilisation and income generation across the assets, strengthen partnership opportunities and align the portfolio with future service delivery priorities, supporting the development of a more modern, resilient and strategically coordinated borough-wide offer.

The **Community Asset Review** identifies a significant opportunity to reposition these assets as integrated, multi-functional community destinations that support culture, wellbeing, civic identity and local economic activity. The overall strategic direction promotes a more coordinated cross-asset approach, underpinned by increased partnership-led delivery, targeted capital investment and improved operational efficiency. Collectively, these measures are intended to strengthen commercial resilience, enhance accessibility and maximise the wider community impact of the Council's key cultural and community assets.

Collectively, these proposals represent an opportunity to safeguard important community infrastructure while creating a more financially sustainable and strategically aligned portfolio of assets for the future. The review concludes that maintaining the status quo is unlikely to be financially sustainable over the medium to long term. Instead, a phased programme of investment, rationalisation and operating model reform is required.



For **Bourne Hall**, the recommended strategic direction is the development of an integrated civic and cultural hub held by a local authority, improving connectivity between the library, museum, café, events and community functions.



For **Epsom Playhouse**, the recommended direction is a transition towards an independent charitable trust operating model, supported by targeted investment to improve flexibility, programming and commercial performance.



For the **Community & Wellbeing Centre**, the recommended approach is a partnership-led delivery model, with rationalisation of the site and consideration of future co-location opportunities where appropriate.

Epsom & Ewell Borough Council owns and operates several significant cultural, civic and community assets which contribute to the social, economic and cultural life of the borough. These assets provide important community infrastructure, support local wellbeing, contribute to placemaking and identity, and create opportunities for engagement, participation and local economic activity.

However, these assets are operating within an increasingly challenging environment characterised by ongoing financial pressure on local government, rising operational and maintenance costs, increasing expectations around accessibility and sustainability, changing audience and service-user behaviour, growing pressure to demonstrate social value and measurable impact, and wider uncertainty associated with Local Government Reorganisation.

The Council has therefore commissioned a strategic review to consider the future role, sustainability and operating models for three key assets: **Bourne Hall**, **Epsom Playhouse**, **Community & Wellbeing Centre**.

This Community Asset Review forms a second phase of work already undertaken, as shown in the strategic roadmap below;

Strategic roadmap



The Community Asset Review sits within a broader strategic context of organisational change and increasing pressure on local authority resources. The following themes are particularly relevant to this review.

Financial Sustainability

Local authorities continue to face significant budget pressures alongside rising energy, staffing and maintenance costs with the assets being subsidised at a rate of £1.8m per annum (based on the 25/26 approved budget and analysis of relevant cost centres) Traditional operating models for community and cultural assets are becoming increasingly difficult to sustain without reform, investment and/or partnership working. The Council needs to consider how these assets can generate higher levels of income, improve operational efficiency and reduce reliance on subsidy over time, while also positioning themselves to access a wider range of external funding opportunities to support future investment and long-term sustainability.

Local Government Reorganisation

The transition towards a future East Surrey Authority creates additional uncertainty around asset ownership, governance and long-term operational arrangements. There is therefore a need to establish clearer financial baselines, strengthen business planning and improve overall asset performance to position these assets more strategically and sustainably for the future, particularly within the context of ongoing organisational change and Local Government Reorganisation.

Community Demand and Wellbeing

Demand for community, cultural and wellbeing services continue to grow. There is increasing national recognition that community assets play a significant role in supporting prevention and early intervention, improving mental health and wellbeing, strengthening social inclusion, encouraging cultural participation and building wider community resilience. As a result, these assets are increasingly viewed not simply as buildings, but as important components of local social infrastructure and place-based service delivery.

Asset Optimisation

A key finding from the review is that these three assets contain underused or constrained spaces. There is an opportunity to improve use across the asset portfolio by rationalising low-value or underused space, increasing flexibility in how buildings are configured and used, improving visitor flow and accessibility, and creating additional income-generating opportunities that strengthen both operational performance and long-term sustainability.

Options considered and rationale

The development of the recommended stewardship and delivery model was informed through a structured **options appraisal process** undertaken across Bourne Hall, Epsom Playhouse and the Community Health & Wellbeing Centre. This process considered operational sustainability, community impact, financial resilience, governance flexibility, investment requirements, and long-term strategic fit.

While each asset has distinct operational characteristics and opportunities, a consistent theme emerged throughout the appraisal process: a single uniform operating model would not optimise the performance or long-term sustainability of all three assets. Instead, the evidence supported a more flexible and tailored approach that balances strategic Council oversight with specialist partnership-led delivery.

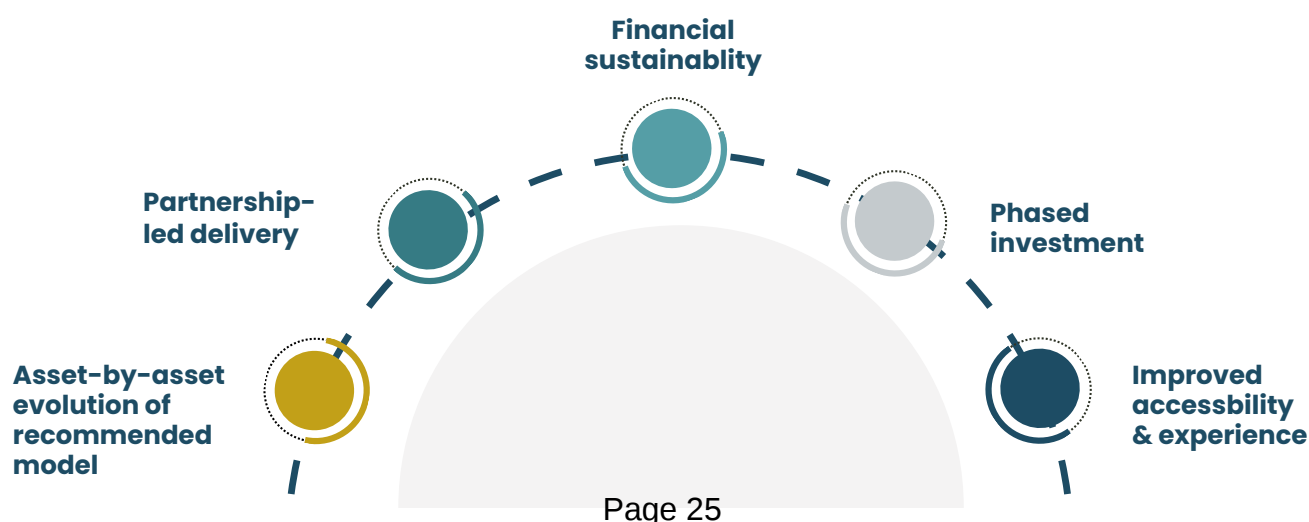
The following sets out the options considered and a brief outline commentary.

- ① Retain existing in-house Council model**
Considered financially unsustainable as a long-term solution across the portfolio
- ② Full externalisation/commercial outsourcing**
Not recommended due to risk to community outcomes and place-based objectives
- ③ Community Asset Transfer (CAT)**
Considered viable for selected assets but not appropriate uniformly across all sites
- ④ Single Integrated Trust across all assets**
Rejected in favour of more tailored stewardship arrangements
- ⑤ Distributed Stewardship & Partnership Model**
Recommended strategy direction as provides tailored solution

The recommended distributed stewardship model emerged through comparative assessment of the operational realities, market opportunities and long-term sustainability requirements associated with each asset. The appraisal process identified several consistent findings:

Key Finding	Implication
The assets perform fundamentally different functions	A single governance or operating model would not effectively support all venues
Specialist expertise is required in arts, culture, wellbeing and community service delivery	Sector-led organisations are better positioned to operate certain assets
External funding opportunities are increasingly tied to charitable or partnership-led models	Greater independence increases access to grant and philanthropic funding
Current operating models rely heavily on Council subsidy and cross-subsidy arrangements	Greater diversification of income and operational responsibility is required
Community expectations increasingly favour collaborative and participatory approaches	Partnership-led stewardship aligns more closely with modern civic asset management
The Council still requires strategic influence over place-based outcomes	Full disposal or complete withdrawal from oversight was not considered appropriate

The review recommends a strategic direction based on a coordinated cross-asset approach. Rather than considering each venue in isolation, the assets should be viewed within the context of both wider Council assets, as well as facilities in the wider geography. The proposed strategic approach is based on the following principles.



Asset-by-Asset Evolution of the Recommended Model

Bourne Hall – Evolution Towards Retained Civic Stewardship

Options Considered	Rationale
Maintain current operating arrangements with incremental improvements	Would not sufficiently address spatial inefficiencies or unlock wider strategic potential
Full external management or transfer	Considered inconsistent with Bourne Hall's role as a core civic and heritage asset
Integrated civic hub model with retained Council oversight	Identified as best balancing civic identity, strategic control and partnership-led activation

The recommended direction for Bourne Hall therefore is a Council-retained civic stewardship model, supported by increased collaboration with cultural, commercial and community partners. This reflects Bourne Hall's strategic importance as a flagship civic, cultural and community destination.

The review proposes that assets including Bourne Hall increasingly operate as flexible, multi-functional community destinations rather than single-purpose buildings. This means creating spaces that support community activity, wellbeing services, cultural participation, learning opportunities and commercial uses within a more integrated operating model. By broadening the role of each venue, the Council can strengthen community impact while also improving long-term sustainability and resilience.

Epsom Playhouse – Evolution Towards Independent Cultural Stewardship

Options Considered	Rationale
Continue direct Council management	Increasingly financially challenging and out of alignment with wider theatre sector trends
Commercial operator model	Risk prioritising commercial return over cultural and community outcomes
Independent charitable trust or specialist arts organisation	Offered strongest balance of financial resilience, funding access and cultural development

Benchmarking and sector analysis demonstrated that charitable trust and independent arts models are increasingly standard across the UK theatre sector and provide greater access to Arts Council funding, philanthropy and operational flexibility. This led to the recommended direction of transferring operational stewardship to a purpose-led cultural organisation through lease, licence or trust arrangements, while maintaining strategic alignment with Council priorities.

Community & Wellbeing Centre – Evolution Towards Hybrid Regeneration and Stewardship

Options Considered	Rationale
Retain existing standalone building and management structure	Limited long-term financial sustainability and constrained income generation
Full disposal and relocation of services	Risks loss of community identity and accessibility concerns
Partial redevelopment with retained community provision	Creates opportunity to balance capital receipt, retained services and long-term sustainability
Third-sector stewardship model	Better aligned with preventative health, community wellbeing and funding opportunities

The resulting recommended approach combines: partial redevelopment and housing-led regeneration; retention of core community and wellbeing functions; and stewardship by a specialist third-sector organisation. This model was identified as offering the best balance between financial sustainability, social value and long-term community benefit.

Partnership-Led Delivery

A consistent theme throughout the review is the importance of stronger partnership-led delivery. There is a significant opportunity to work more closely with cultural organisations, health partners, community organisations, specialist providers and commercial operators across all of the assets.

A partnership-based approach for ownership and delivery for the Community and Wellbeing Centre would enable access to additional expertise, greater operational flexibility and wider external funding opportunities. It would also support a more collaborative delivery model in which risk, innovation and service delivery can be shared more effectively across organisations.

Financial Sustainability

The review identifies a need to move towards a more sustainable financial model through;

- Diversified income streams
- Improved commercial activity
- Better use of space
- Reduced operational inefficiencies
- Reduced utility costs after infrastructure investment
- Long-term capital planning

Phased Investment

A phased investment approach is recommended, balancing:

- Immediate quick wins
- Medium-term transformation
- Long-term infrastructure investment

This would allow improvements to be delivered progressively while minimising disruption.

Improved Accessibility and Experience

Across all assets there is scope to improve:

- Unique Selling Point (USP) and branding
- Accessibility
- Visitor flow
- Wayfinding
- Inclusivity
- Overall user experience



Bourne Hall is one of the borough's most important civic and community assets. Elements of the building are listed including an internal wall and staircase. The building occupies a prominent position within the borough and plays an important role in community identity and engagement. It combines;

- library services
- community spaces
- museum provision
- café facilities
- events and conferencing
- public and civic functions

The review identifies Bourne Hall as the asset with the greatest opportunity for transformation across the Council's portfolio and that it should be retained within a local authority portfolio working with stakeholders, hirers and partners.

The **proposed strategic direction** is to reposition the building as a fully integrated civic and cultural hub with stronger connections between community services, cultural activity and commercial uses.

Central to this approach is improving the relationship between currently fragmented spaces and creating a more cohesive visitor experience throughout the building. This includes;

- enhancing accessibility and flow
- rationalising under used areas
- strengthening commercial activity
- expanding community and wellbeing uses in a way that supports both social value and long-term sustainability

The current layout creates fragmentation between users. There is an opportunity to create stronger integration between: the library, Museum provision, Café spaces, Community and event areas, Outdoor spaces and parkland.

This would create a more cohesive and engaging visitor experience. Several areas within the building are currently under used or used inefficiently, presenting an opportunity for rationalisation and reconfiguration to improve both functionality and financial sustainability.

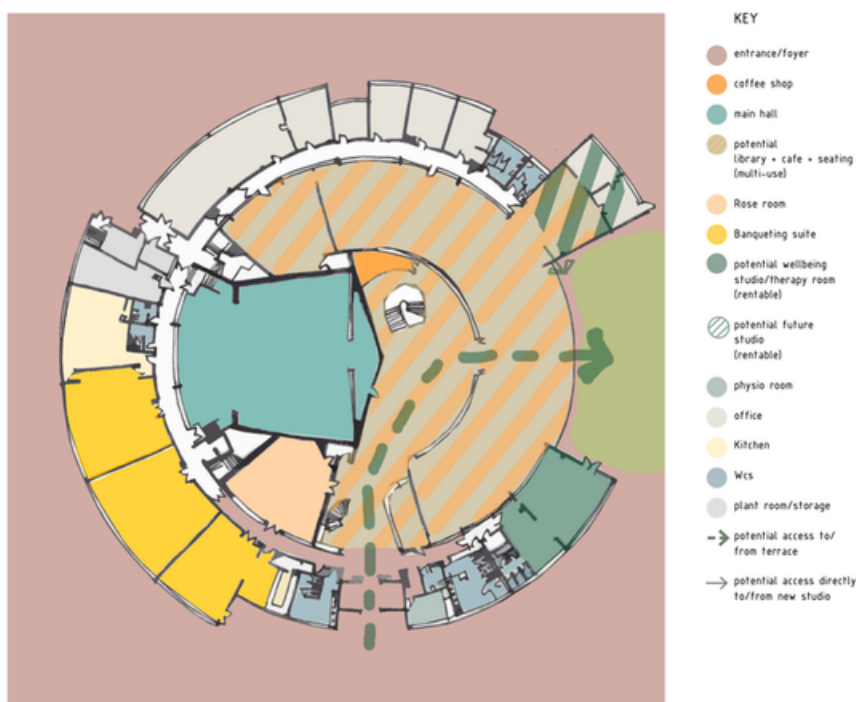
The existing layout presents significant opportunities to reconfigure open-plan and public-facing spaces, improving circulation, visibility and operational integration across the building, while creating a more connected and efficient Civic and Cultural Hub, as shown in the spatial diagrams.

Opportunities include reducing the footprint required for storage, reconfiguring existing studio and meeting spaces to provide greater flexibility, creating dedicated therapy and consultation rooms to support wellbeing and community services, and developing more adaptable conferencing and civic meeting facilities capable of supporting a broader range of uses and generating increased income.

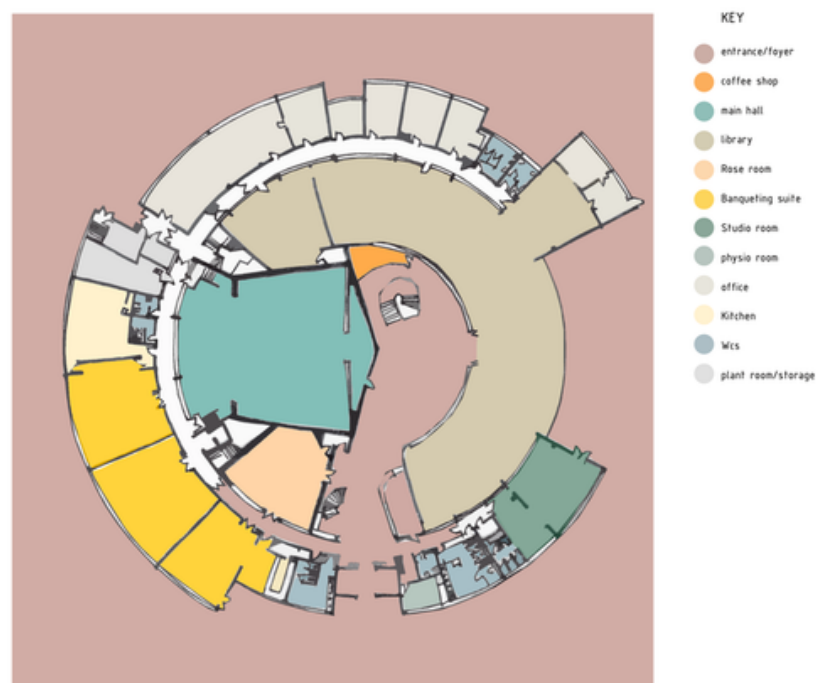
The **building** faces important challenges which need to be addressed as part of any long-term strategy for the asset. These include ageing infrastructure, accessibility limitations, ongoing maintenance liabilities, constraints associated with the building's listed status, and issues relating to heating and ventilation systems.

Collectively, these factors reinforce the need for a phased and carefully planned investment approach that balances immediate operational requirements with longer-term transformation and environmentally sustainability objectives.

CONCEPT GROUND FLOOR PLAN: ACCOMMODATION DIAGRAM



EXISTING GROUND FLOOR PLAN: ACCOMMODATION DIAGRAM



There is potential for selected **wellbeing and support services** to be integrated into Bourne Hall, supporting;

- increased daytime activity
- stronger community engagement
- greater integration of services
- improved use of the building

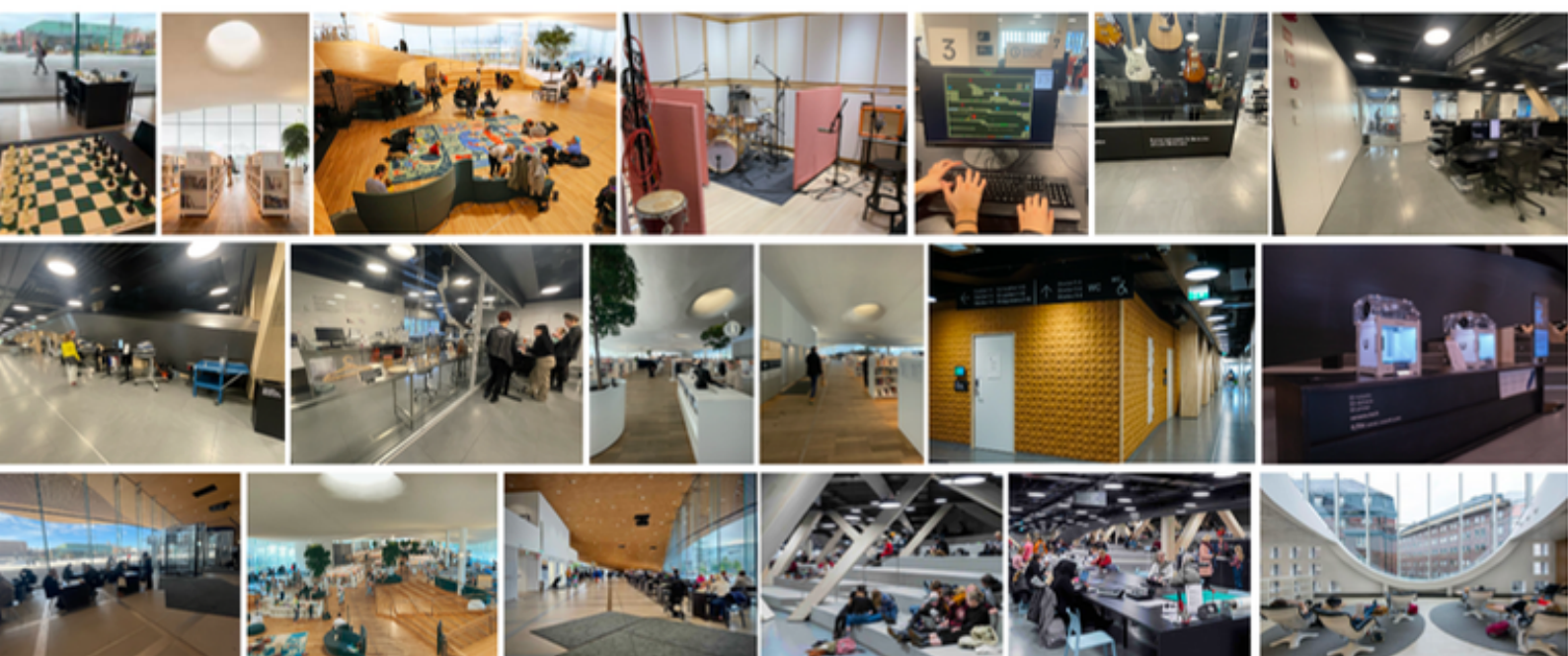
There is scope to increase commercial and community activity across the asset through the expansion of events and conferencing provision, enhanced café and food sales, increased community hire and a broader programme of training, learning and workshop activity.

In addition, there is an opportunity to introduce more **flexible workspace provision**, supporting a wider range of users while creating additional income streams and increasing daytime use of the building. The recommended strategic direction is the spatial reconfiguration of Bourne Hall to create an integrated civic and cultural hub.

This approach provides the strongest **long-term strategic value** by improving the overall use and connectivity of the building, strengthening community impact and creating a more flexible and financially sustainable operating model.

The proposed direction would support better use of space, enhance the visitor experience, and create increased opportunities for partnership working, community engagement and income generation, while positioning Bourne Hall as a **modern, multi-functional destination at the heart of the borough.**

Precedents



Epsom Playhouse is a **major cultural asset** for the borough and makes a significant contribution to the area's wider cultural offer, town centre activity and evening economy. The venue plays an important role in supporting community participation, strengthening local identity and contributing to the borough's wider placemaking ambitions through arts, entertainment and community engagement.

The venue has an **established reputation and audience base** but faces increasing financial and operational pressures. The review identifies a clear opportunity to reposition Epsom Playhouse as a more flexible, financially sustainable and community-focused cultural venue.

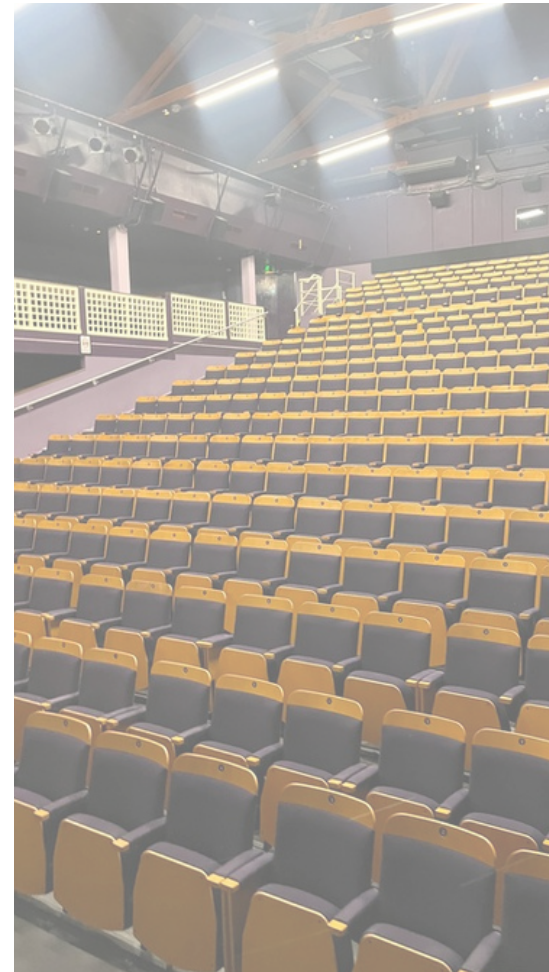
While the Playhouse remains an important and valued asset, the current **operating model and building configuration** limit its ability to maximise use, income and wider community impact. The proposed direction focuses on;

- improving commercial resilience
- expanding daytime activity
- increasing secondary spend
- enhancing flexibility across the building

This reflects wider national trends across the theatre sector, where venues are increasingly operating as civic and cultural hubs with a broader range of uses and stronger partnership-based delivery models.

The Playhouse, currently owned and managed by the council faces significant challenges which impact its long-term **sustainability and operational resilience**. These include high operating costs, an ongoing dependence on subsidy and increasing competition from other cultural and entertainment venues. In addition, the current operating model limits access to certain external grant funding opportunities, while the building itself continues to face infrastructure and maintenance pressures that will require ongoing investment and strategic planning.

A key opportunity for Epsom Playhouse is to reposition the venue as a more active **all-day cultural and community destination** rather than primarily an evening performance venue. This would create opportunities for increased daytime cultural activity, broader community use, flexible workspace and rehearsal provision, workshops, learning activity and enhanced café and bar trade, helping to improve utilisation and strengthen financial sustainability throughout the day. There is also significant potential to improve the **front-of-house experience** through the reconfiguration of foyer and bar areas.

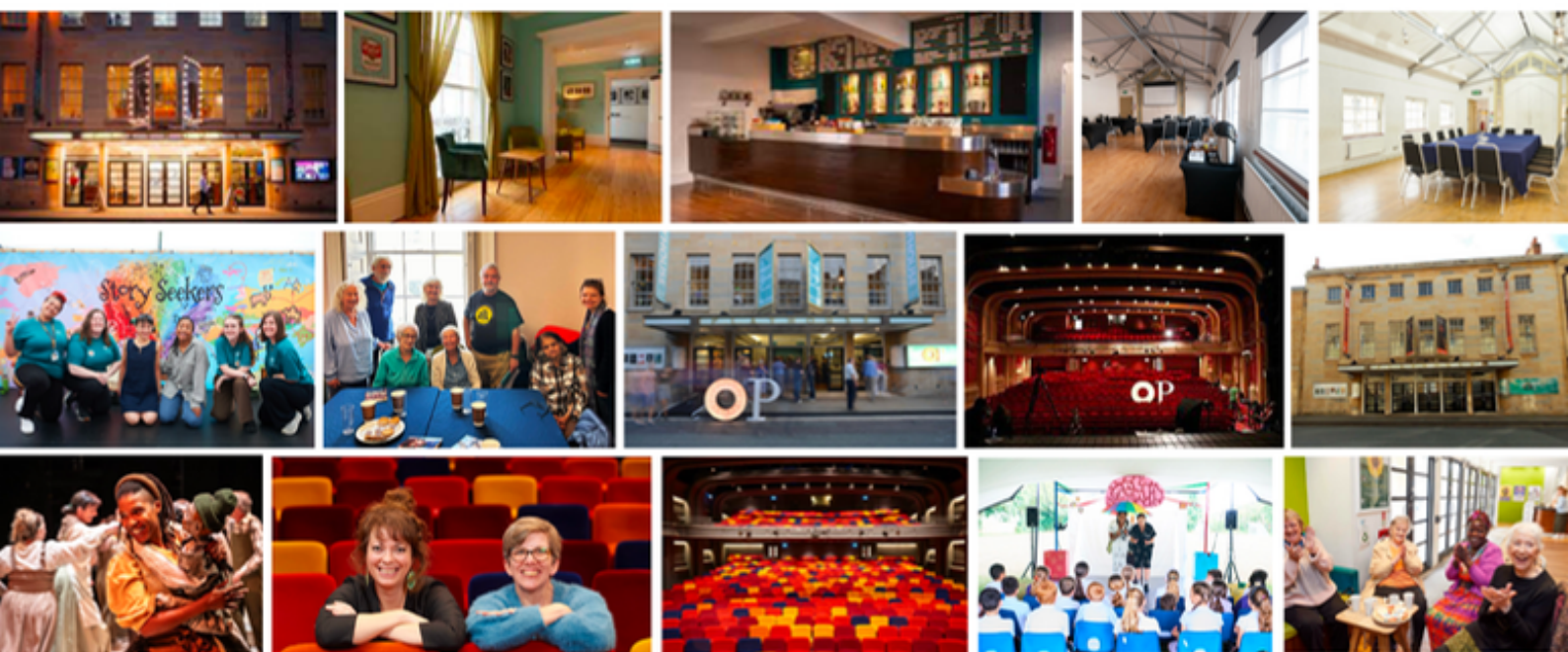


Enhancements in these spaces could improve visitor experience, increase dwell time, support greater daytime activation and strengthen secondary spend through improved food and beverage income. In parallel, improvements to dressing rooms and backstage facilities would strengthen the venue's attractiveness to touring productions, improve operational flexibility and enhance the overall market position of the Playhouse within the regional cultural and entertainment sector.

The review also identified considerable opportunities to strengthen **community and cultural partnerships**, particularly with schools and colleges, youth arts organisations, community groups and wider regional cultural partners. A more collaborative approach would help expand participation, diversify programming and reinforce the Playhouse's role as a key cultural anchor within the borough.

The recommended strategic direction for Epsom Playhouse is a transition towards an **independent charitable trust operating model**. This approach would provide greater operational flexibility, improve access to external funding opportunities and reduce overhead costs, while also creating stronger opportunities for partnership working and enabling any operational surpluses to be reinvested directly into the venue and its programme. The model reflects wider national trends across the theatre and cultural sector, where charitable trust arrangements are increasingly being adopted to support long-term sustainability, resilience and community impact.

Precedents





The Community & Wellbeing Centre plays an important role in supporting older residents, vulnerable adults and individuals with health and mobility needs through a range of wellbeing and support services. The asset delivers significant **social value** within the borough and contributes directly to wider prevention, health and wellbeing priorities by providing accessible community-based support and opportunities for social connection, independence and early intervention.

The review identifies an opportunity to **modernise and strengthen** the long-term sustainability of the Community & Wellbeing Centre service offer. This includes opportunities to expand wellbeing provision, improve use of the existing space, strengthen partnership-led delivery models and better integrate services with the Council's wider community asset portfolio.

The asset faces challenges which impact on its **long-term sustainability** and future operating model. These include relatively limited commercial income potential, ongoing subsidy requirements and wider financial sustainability pressures, alongside uncertainty associated with future local government reform and organisational change. Collectively, these factors reinforce the need for a strategic review of how the asset is operated, funded and integrated within the wider community infrastructure portfolio.

There is potential to explore **partial redevelopment opportunities** as part of a broader long-term asset strategy.

There is significant potential to expand the range of services delivered from the centre, including increased therapy and wellbeing provision, social prescribing activity, wider community support services and greater use of group activity and hall spaces. A stronger **partnership-led approach** could also support a more diverse and resilient service offer while improving access to external funding and specialist expertise.

Precedents





The Centre presents opportunities to strengthen **collaboration** with NHS and Integrated Care partners, specialist wellbeing providers, community organisations and wider rehabilitation and support services.

A more **integrated delivery model** could improve outcomes for residents while creating stronger alignment with wider health and prevention priorities across the borough. As part of the broader cross-asset strategy, there may also be opportunities for selected functions to be integrated into Bourne Hall. Any future rationalisation or co-location approach would require careful consideration of accessibility, the needs of service users, continuity of provision and the overall suitability of alternative accommodation to ensure that services remain inclusive, accessible and effective.

The recommended strategic direction is a partial redevelopment of the current site and **conversion to residential and partnership-led model** which retains core wellbeing services while supporting rationalisation, modernisation and greater operational sustainability. The model would be to explore charitable and community partners to take on lease/licence of the asset. This approach would increase opportunities for partnership-led delivery and allow the Council to explore future co-location opportunities where appropriate as part of a wider cross-asset strategy. The recommended direction seeks to balance financial sustainability with the continued delivery of strong community and wellbeing outcomes.

A key theme emerging from the review is the importance of future operating models and the need to consider more **sustainable and flexible** approaches to stewardship and delivery.

Traditional direct local authority operating models are becoming increasingly difficult to sustain within the current financial environment, particularly given rising operational costs, growing service expectations and increasing pressure on public sector resources. As a result, the review considered a range of **potential governance and operating approaches** for the Council's key community and cultural assets.

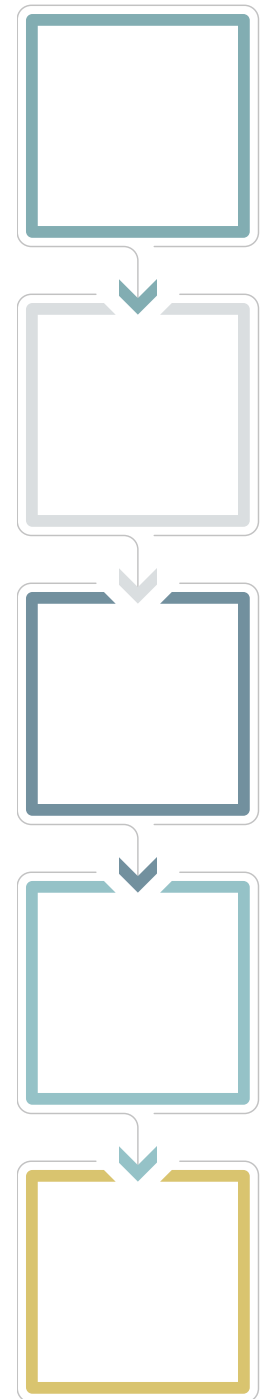
Continuing with full Council operation would maintain direct control over the assets and services; however, this approach would continue to limit operational flexibility, restrict access to certain external funding opportunities and reduce commercial agility, while also limiting the Council's ability to reduce long-term operating costs and financial exposure.

The review also considered the potential creation of a single development trust responsible for multiple assets across the portfolio. Whilst this model could create some efficiencies and opportunities for integrated management, it would also introduce additional organisational complexity, governance challenges and operational risk associated with managing a diverse range of assets and service types within a single entity.

The preferred strategic direction is a **distributed stewardship and partnership model**, designed to reflect the distinct purpose, operational needs and long-term opportunities associated with each of the three assets. Rather than applying a single ownership and management arrangement across all sites, this model recognises that different community assets are best stewarded through governance structures that are aligned to their specific function, user groups, funding opportunities and service outcomes.

Under this approach, the Council would retain an **overarching strategic role**, setting long-term objectives, safeguarding community benefit and maintaining influence over place-based outcomes, while enabling a range of purpose-led organisations and delivery partners to take responsibility for the day-to-day stewardship and operation of individual assets.

This creates a more **flexible and resilient ecosystem of ownership, management and delivery arrangements**, allowing each venue to operate in a way that best supports its social, cultural and commercial potential.



Bourne Hall

Bourne Hall would remain in **direct Council ownership and management**, reflecting its continued civic role and strategic importance within the borough. However, the operating model would evolve towards a more **collaborative stewardship approach**, with increased involvement from purpose-led hirers, cultural organisations, community stakeholders and service partners. This would allow the venue to function as a more dynamic civic and community platform, where programming, events, wellbeing services, learning activity and community uses are co-developed with local partners rather than delivered solely through traditional Council structures. The Council would continue to oversee the building, core operations and strategic direction while encouraging greater partnership-led activation of spaces and services.

This model would support:

- stronger community participation and co-production
- increased utilisation and commercial flexibility of spaces
- broader cultural and wellbeing programming
- improved responsiveness to local needs
- opportunities for external partnerships and funding aligned to social outcomes

The Playhouse

The Playhouse would move towards an **independent stewardship arrangement** through either a long lease, licence agreement or potential community asset transfer to a purpose-led arts and cultural organisation. This reflects the specialist nature of arts venue management and the advantages of sector-led programming, fundraising and creative development. Under this arrangement, the Council would retain a **strategic interest in the asset** and its contribution to the borough's cultural offer, while operational responsibility would sit with an independent organisation whose primary mission is arts, culture and community engagement.

The Council would retain ownership and management of the associated car parking assets to ensure continued public access, town centre functionality and income generation.

A specialist stewardship model for The Playhouse would enable;

- greater artistic and programming autonomy
- access to cultural and arts funding streams not available directly to local authorities
- stronger creative sector partnerships
- improved volunteer and community engagement opportunities
- increased entrepreneurial and commercial flexibility
- a governance structure better aligned to the operational realities of running a cultural venue

This arrangement also reduces operational risk and financial pressure on the Council while helping secure the long-term sustainability of the venue as a cultural asset.

Community & Wellbeing Centre

For the Community and Wellbeing Centre, the stewardship model would combine **development-led regeneration with long-term community asset management**.

Approximately one-third of the asset would be released for residential development, generating capital receipts and helping to improve the overall viability and sustainability of the wider site. The remaining two-thirds would be retained for community, wellbeing and service delivery purposes and operated through a lease or licence arrangement with a third sector or social purpose organisation.

That organisation would assume responsibility not only for managing the building but also for coordinating and delivering services from the centre, potentially bringing together health, wellbeing, social support, community development and voluntary sector activity within a more integrated delivery framework. This model would:

- create a financially sustainable mixed-use approach to the site
- embed community-led service delivery within the asset
- support integrated health and wellbeing outcomes
- unlock external grant and social investment opportunities
- encourage innovation in service provision
- strengthen long-term community ownership and participation

Cross-Cutting Strategic Principles

Principle	Application Across All Assets
Distributed Stewardship	Different ownership and operating models tailored to the specific function and needs of each asset
Strategic Council Oversight	Council retains long-term strategic influence, governance oversight and place leadership
Specialist Delivery Partners	Day-to-day management undertaken by specialist cultural, community or third-sector organisations where appropriate
Financial Sustainability	Combination of capital investment, asset rationalisation, commercial income and external funding
Partnership-Led Delivery	Strong collaboration with NHS/ICS, cultural organisations, voluntary sector and commercial partners
Flexibility & Adaptability	Assets designed to evolve over time in response to changing service demands and community needs
Community Impact	Focus on wellbeing, accessibility, cultural participation and long term public value.

Overall Strategic Benefits of the Distributed Stewardship Model

Collectively, the distributed stewardship model creates a balanced framework that combines:

- retained strategic Council oversight
- diversified operational responsibility
- specialist sector expertise
- increased community participation
- greater financial resilience
- improved adaptability over time

Importantly, the model avoids a “one-size-fits-all” approach. Instead, it acknowledges that civic venues, arts facilities and community wellbeing assets each require different governance cultures, delivery mechanisms and partnership arrangements to thrive.

By distributing stewardship across a network of aligned but distinct partnerships, the Council can focus on its role as strategic place leader and custodian of public value, while enabling specialist organisations to maximise the social, cultural and operational potential of individual assets. Over time, this approach also creates greater flexibility to respond to changing community needs, funding environments and organisational priorities, ensuring that each asset can evolve appropriately while continuing to deliver long-term public benefit.

Potential Stewardship Structure by Asset

Asset	Ownership	Management Model	Strategic Role
Bourne Hall	Council retained ownership and management	Partnership-led activation with purpose-led hirers and stakeholders	Integrated civic and cultural hub
Epsom Playhouse	Council ownership retained initially, with potential lease/licence/asset transfer	Independent arts and cultural organisation or charitable trust	Specialist cultural venue with expanded programming
Community Health & Wellbeing Centre	Mixed model: partial redevelopment plus retained community asset	Third-sector or social purpose organisation stewardship	Integrated wellbeing and community services hub

The review confirms that the current operating position across several assets is increasingly challenging. Rising operational and maintenance costs, continued reliance on subsidy and historic cross-subsidy arrangements between services have created a situation in which assets are not operating on a sustainable basis.

Existing Council subsidy

Venue	2026 Budget
Epsom Playhouse - Invest and optimise	£400k (Deficit)
Health & Wellbeing Hub : Expand in situ	£450k (Deficit)
Bourne Hall - Integrated Civic Hub	£920k (Deficit)
Total	£1,770k (Deficit)

(based on the 25/26 approved budget and analysis of relevant cost centres)

In response, the review recommends moving towards a more **transparent, resilient and strategically aligned financial model**. This includes establishing clearer financial baselines, improving understanding of the true operational costs associated with each venue and developing a broader and more diversified mix of income streams to reduce long-term dependency on subsidy.

A central objective is to strengthen income diversification across the portfolio. This includes;

- increasing hire and events activity
- improving food and beverage offers
- expanding community and daytime use of the assets
- developing partnerships and commissioned service opportunities
- increasing access to external funding and grant programmes.

Collectively, these measures are intended to create more resilient operating models while improving utilisation and overall commercial performance. The review recognises that **targeted capital investment** will be required to unlock the long-term sustainability and transformation of the assets. Key investment priorities include accessibility improvements, heating and wider infrastructure upgrades, spatial reconfiguration, front-of-house enhancements and wider compliance and maintenance and environmental improvement works.

These interventions are not simply maintenance requirements, but are strategic investments designed to improve visitor experience, operational efficiency and future income-generating potential.

To support delivery, a **blended funding approach** will be essential. Potential funding opportunities include Council capital investment, capital receipts and a range of external funding sources, including Arts Council England, the National Lottery Heritage Fund, NHS and wellbeing funding streams, DCMS programmes and wider community and cultural grant opportunities. A coordinated funding strategy will therefore be critical to enabling phased delivery and long-term sustainability across the asset portfolio.

High level financial modelling

Using the Council's published 2025/26 baseline figures, high level financial modelling has been carried out to scope opportunities, impacts, and viability. Moving forward, more detailed deep-dive analysis would need to be carried out as part of future business plans and business cases.

The purpose of this modelling is to test how different operational, commercial and investment options could affect the future financial sustainability and performance of each asset, helping to identify where the greatest opportunities and risks may lie.

The assumptions underpinning the models have been informed by significant experience of working with community assets, alongside extensive financial forecasting, income and expenditure business planning, and qualified financial analysis. It also draws on benchmarking, comparable building projects, and similar operational schemes.

The modelling uses between two and five potential change scenarios to each building;

- For Bourne Hall, five different streams of change, including library and café changes, heating investments, and the repositioning of the banqueting suite and Rose Room.
- For the Playhouse, three potential changes have been modelled.
- For the Community & Wellbeing Centre, a simpler model has been used focused primarily on changes in lease income and staffing assumptions.

All scenarios are layered with prudent and conservative assumptions, while also considering the wider ripple effects across operations and financial performance. Some figures, particularly revenue, may change significantly under certain scenarios; however, associated expenditure will also increase accordingly, recognising that not all costs will rise at the same rate.

Venue	2026 Budget	Change	Future
Epsom Playhouse – Invest and optimise	£400k (Deficit)	+£240k	£160k (Deficit)
Health & Wellbeing Centre – rationalise	£450k (Deficit)	+£470k	£20k (Surplus)
Bourne Hall – Integrated Civic Hub	£920k (Deficit)	+£150k	£770k (Deficit)
Total	£1,770k (Deficit)	+£860k	£910k (Deficit)

These figures reflect high level assumptions regarding :

- changes in revenue (equate to a saving) include direct costs, overheads and Corporate recharges
- Playhouse to be moved to a Trust model, with staff will Tupe'd to the new organisation
- capital receipts to be identified fund capital costs such as remodelling venues, a new Bourne Hall heating system and any administrative costs
- Central costs reduce in line with a reduced Council function – responsibilities passed to third parties in accordance with proposed operating models

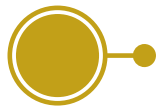
The review identifies strategic risks which will require careful management throughout the development and delivery of the programme.



Financial risk remains a significant consideration, particularly in relation to rising capital costs and ongoing operational pressures across the assets. To mitigate this, the review recommends a phased investment approach supported by strong business planning, income diversification and a coordinated external funding strategy designed to improve long-term resilience and reduce dependency on subsidy.



There is also a risk that transformation and investment programmes could **disrupt existing services** and impact current users during implementation. This will require careful programme phasing, strong communications planning and, where necessary, temporary decant arrangements to minimise disruption and maintain continuity of service delivery.



Changes to community and cultural assets can also create **uncertainty** and concern among stakeholders, service users and the wider community. It will be important to ensure early engagement, clear communication and transparent decision-making throughout the programme, alongside a strong emphasis on demonstrating the long-term community benefits and strategic rationale for change.

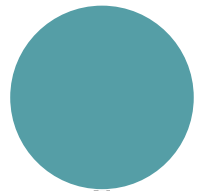


The complexity of the programme itself presents a **delivery risk**, given the involvement of multiple assets, stakeholders, funding streams and operating models. This reinforces the need for strong governance arrangements, clear programme management structures and well-defined decision-making processes to ensure effective oversight and coordinated delivery.



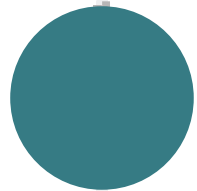
Finally, wider uncertainty associated with Local Government Reorganisation and **future governance arrangements** remains an important strategic consideration. To mitigate this, the review recommends maintaining flexible operating models, establishing strong financial baselines and ensuring that assets are positioned strategically and sustainably for the future regardless of future organisational structures.

The review recommends a phased programme approach over the next 12 to 24 months to support structured delivery, minimise operational disruption and allow investment and transformation activity to be aligned with emerging priorities and funding opportunities.



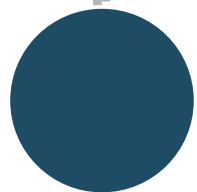
The **first phase** should focus on establishing strategic agreement around the recommended direction of travel for the assets, alongside the development of appropriate governance arrangements and more detailed financial modelling.

This stage would also include early stakeholder engagement and the delivery of initial quick-win improvements designed to demonstrate progress, improve operational performance and build momentum for the wider programme.



The **second phase** would focus on the development of more detailed business cases and investment plans for each asset, including capital planning, funding applications, design development and the refinement of future operating models.

This stage will be critical in establishing affordability, deliverability and long-term sustainability, while also ensuring alignment between the various workstreams across the programme.



The **final phase** would move into delivery and transformation, including capital works, service integration, operating model transitions and the mobilisation of delivery and partnership arrangements.

This phase would ultimately support implementation of the longer-term strategic vision for the Council's community and cultural asset portfolio. Strong governance arrangements will be essential throughout the programme to ensure effective oversight, accountability and decision-making.

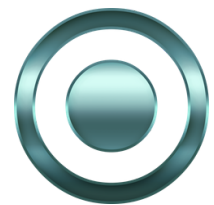
This should include clear officer oversight, ongoing Member engagement, robust programme management arrangements, stakeholder involvement and regular financial monitoring to support successful delivery and strategic alignment across the programme.

The most immediate quick wins focus on improving utilisation, visibility and income generation across the asset portfolio without requiring significant capital investment.

These include increasing community hire and events activity, expanding daytime use of facilities, strengthening café and food and beverage offers, improving marketing, branding and wayfinding, and introducing more flexible use of underutilised spaces.

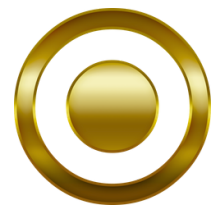
Bourne Hall

Early actions could include reconfiguring existing rooms for greater flexibility, creating spaces for wellbeing and community services, and improving links between the library, museum, café and events programme.



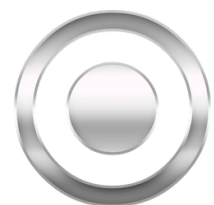
Epsom Playhouse

Quick wins could focus on activating the venue during the daytime through workshops, community use and cultural activities, alongside enhancements to the foyer and bar offer to increase secondary spend.



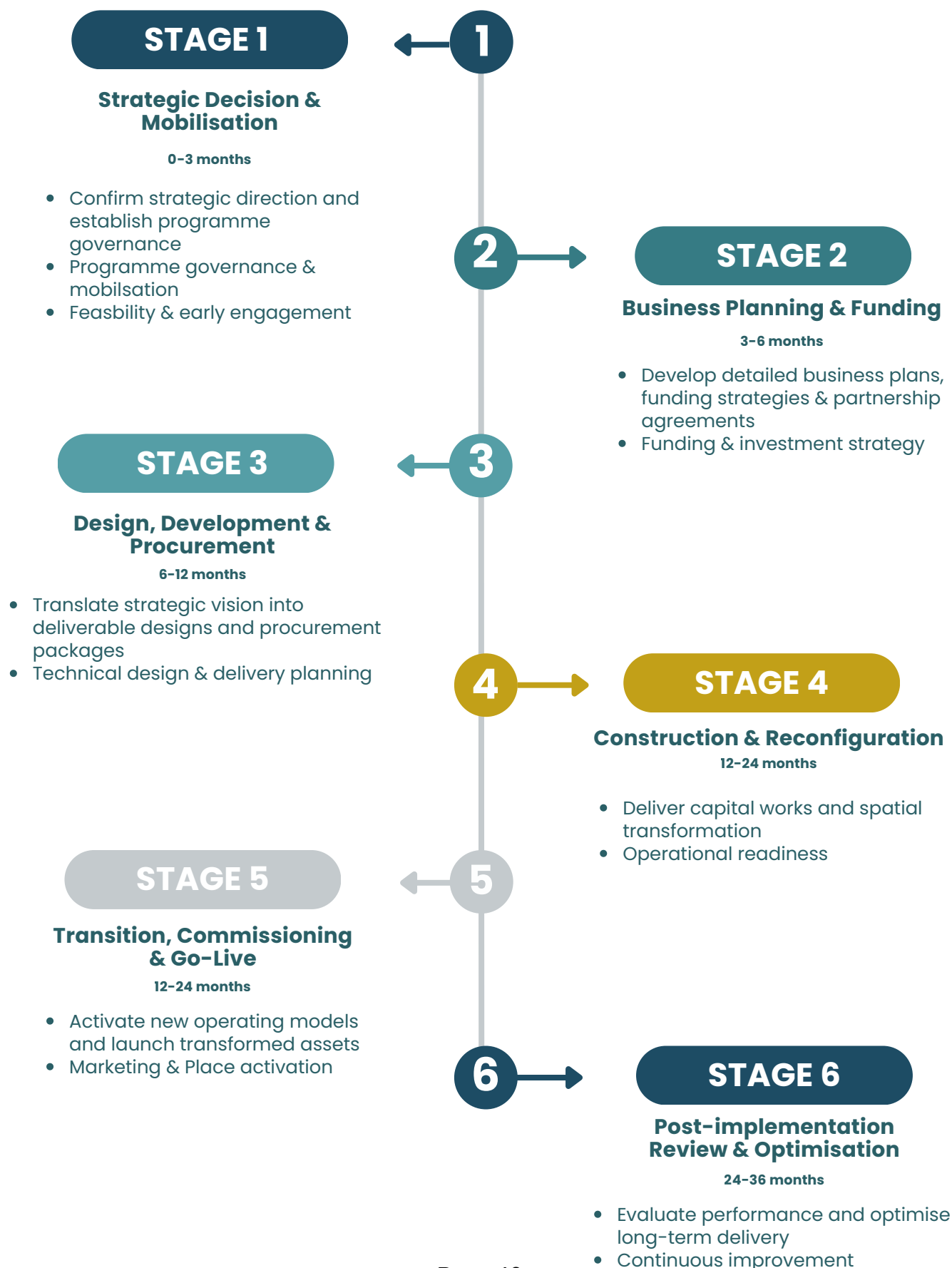
Community & Wellbeing Centre

For the Community & Wellbeing Centre, opportunities exist to strengthen partnerships, expand wellbeing activities and maximise the use of existing spaces.



Across all three assets, early engagement with potential partners, improved programming, clearer branding and promotion, and the development of a coordinated cross-asset approach would help demonstrate progress, increase income and build momentum for longer-term transformation.

Asset	Quick Win Opportunity	Potential Benefit
Bourne Hall	Improve connectivity between the library, museum, café and community spaces through enhanced programming and coordinated visitor journeys.	Increased footfall, longer dwell times and improved visitor experience.
	Reconfigure underused meeting and studio spaces for flexible community, training, therapy and wellbeing uses.	Higher utilisation rates and additional hire income.
	Expand community events, workshops and learning activities.	Increased engagement, income generation and community impact.
	Improve wayfinding, signage and marketing across the building.	Better visitor experience and increased use of facilities.
Epsom Playhouse	Increase daytime activity through workshops, rehearsals, community groups, business events and learning programmes.	Improved utilisation and additional revenue streams.
	Enhance the foyer, café and bar offer through improved programming and promotion.	Increased secondary spend and visitor satisfaction.
	Develop stronger partnerships with schools, colleges and local arts organisations.	Increased participation, audience development and community engagement.
Community & Wellbeing Centre	Expand wellbeing activities and social prescribing programmes through existing partnerships.	Increased participation and improved health and wellbeing outcomes.
	Maximise use of existing rooms and community spaces through targeted hire and programming.	Improved utilisation and operational efficiency.
	Develop partnerships with health, voluntary and community sector organisations.	Greater service reach and access to external funding opportunities.
All Assets	Implement a coordinated marketing and branding strategy across the portfolio.	Increased awareness, attendance and commercial performance.
	Review pricing, hire packages and commercial opportunities.	Increased earned income and improved financial sustainability.
	Establish a programme of early stakeholder engagement and partnership development.	Builds support for future transformation and identifies new delivery opportunities.
	Undertake space utilisation reviews and introduce more flexible operating arrangements.	Better use of assets, reduced inefficiencies and increased income generation.



This review identifies a **significant opportunity** for Epsom & Ewell Borough Council to reposition its key community and cultural assets for the future.

The direction outlined is not simply about buildings or operational savings; it is about ensuring that important civic and community infrastructure remains relevant, accessible and financially sustainable within a rapidly changing local government environment. Collectively, Bourne Hall, Epsom Playhouse and the Community & Wellbeing Centre play an important role in supporting **local identity, culture, wellbeing and community resilience across the borough.**

The review demonstrates that, through **targeted investment, stronger partnership working and more flexible operating models**, these assets can continue to deliver significant public value, while becoming more sustainable and resilient over the long term.

The proposals provide a **strategic framework** for improving financial sustainability, protecting community value, strengthening cultural and wellbeing outcomes, supporting placemaking and local identity and creating more resilient and adaptable operating models across the Council's community asset portfolio.

The review highlights strong potential to transform Bourne Hall into a more integrated civic and cultural hub, reposition Epsom Playhouse as a more sustainable and flexible cultural venue, and modernise and strengthen the borough's wellbeing offer through increased partnership-led delivery and service integration.

Importantly, the report recognises that these assets are not simply buildings. They are community anchors, cultural destinations, civic assets and places of wellbeing and social connection which contribute significantly to the wider social and economic life of the borough.

The recommended strategic direction seeks to safeguard these assets while ensuring that they remain financially sustainable, operationally resilient and capable of meeting future community needs. A **phased and partnership-led approach**, supported by targeted investment and strong governance arrangements, provides the strongest opportunity to deliver long-term success. The next stage will be to refine the recommended strategic options into more detailed business cases, financial models and implementation plans for future consideration by Officers and Members.

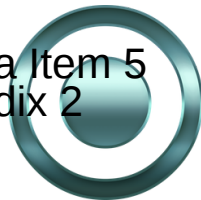
Community Asset Plans

Summary Documents



Community Asset Plan (CAP)

Bourne Hall, Ewell



Bourne Hall is the borough's principal civic and community asset, providing library services, museum provision, community spaces, events, conferencing facilities, café services and civic functions.

Strategic vision

To create an integrated Civic and Cultural Hub that brings together community, culture, wellbeing and civic activity within a more connected, accessible and financially sustainable operating model.

Key challenges

- Fragmented visitor experience and disconnected uses, Underutilised spaces
- Ageing infrastructure and maintenance liabilities, Accessibility constraints
- Heating and environmental performance issues
- Ongoing subsidy requirements

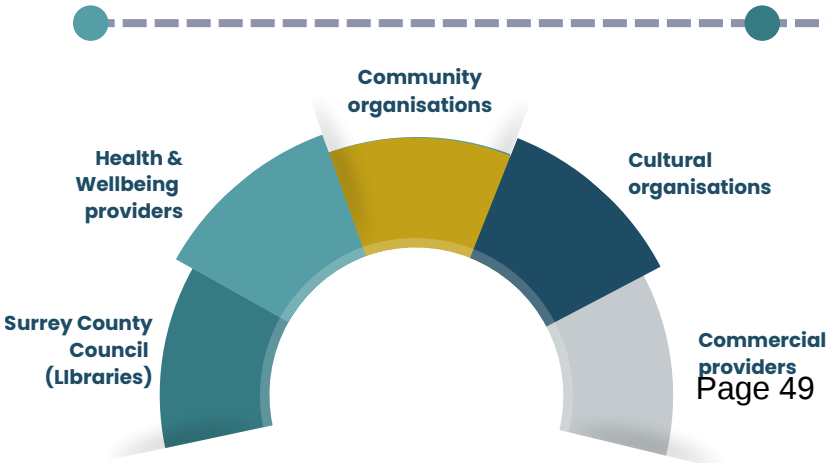
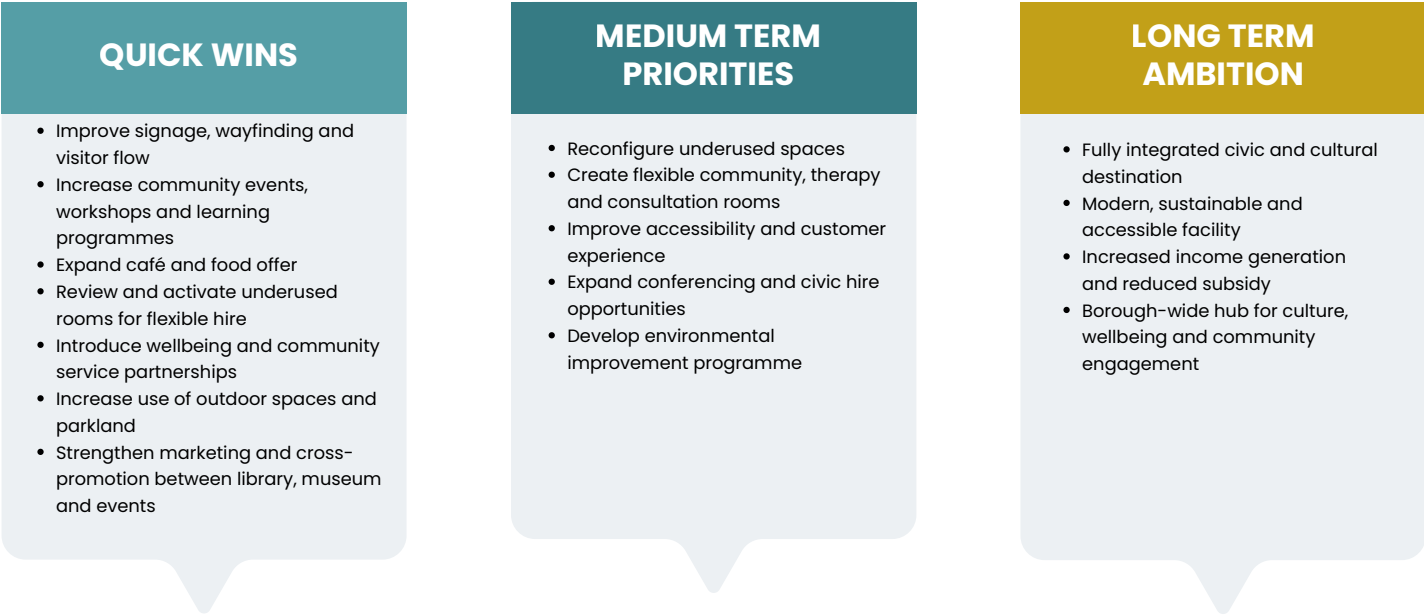
Ownership & operating model

Retain Council ownership while adopting a more commercially focused and integrated operating model, with greater coordination across cultural, community, civic and hospitality functions.

Key opportunities

- A more joined-up visitor experience linking the library, museum, café, events and community spaces.
- Increased utilisation of underused spaces through flexible programming, workspace, community hire and commercial events.
- Improve café performance and strengthen its role as a destination within the building.
- Invest in energy efficiency and heating systems.

Implementation Roadmap



Outcomes

- Increased utilisation and footfall
- Improved financial sustainability
- Enhanced community impact
- Stronger cultural and wellbeing offer, Improved visitor experience

Community Asset Plan (CAP)

The Playhouse, Epsom



The borough's primary theatre and performing arts venue, supporting cultural participation, entertainment, community activity and the evening economy. .

Strategic vision

To establish Epsom Playhouse as a vibrant, all-day cultural venue operating through an independent charitable trust model, increasing flexibility, resilience and community impact.

Ownership & operating model

Retain Council ownership of the asset while transitioning to a purpose-led (e.g. Trust) operating model. Retain Council ownership of the asset with long-term lease or licence arrangement in place for operators and users.

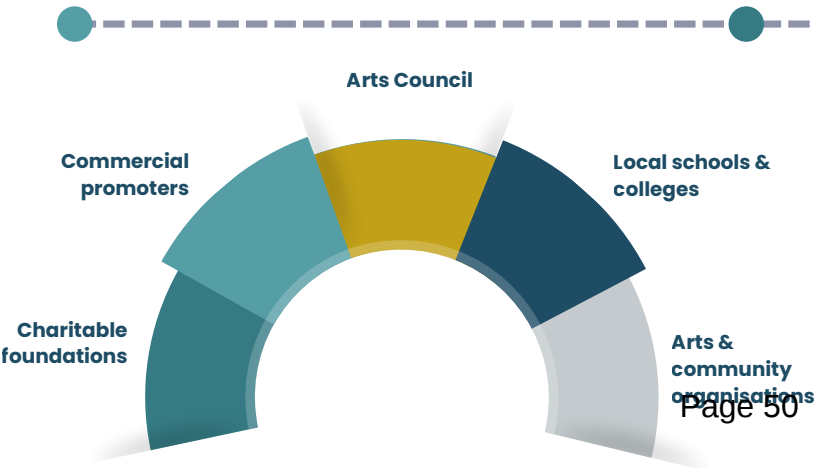
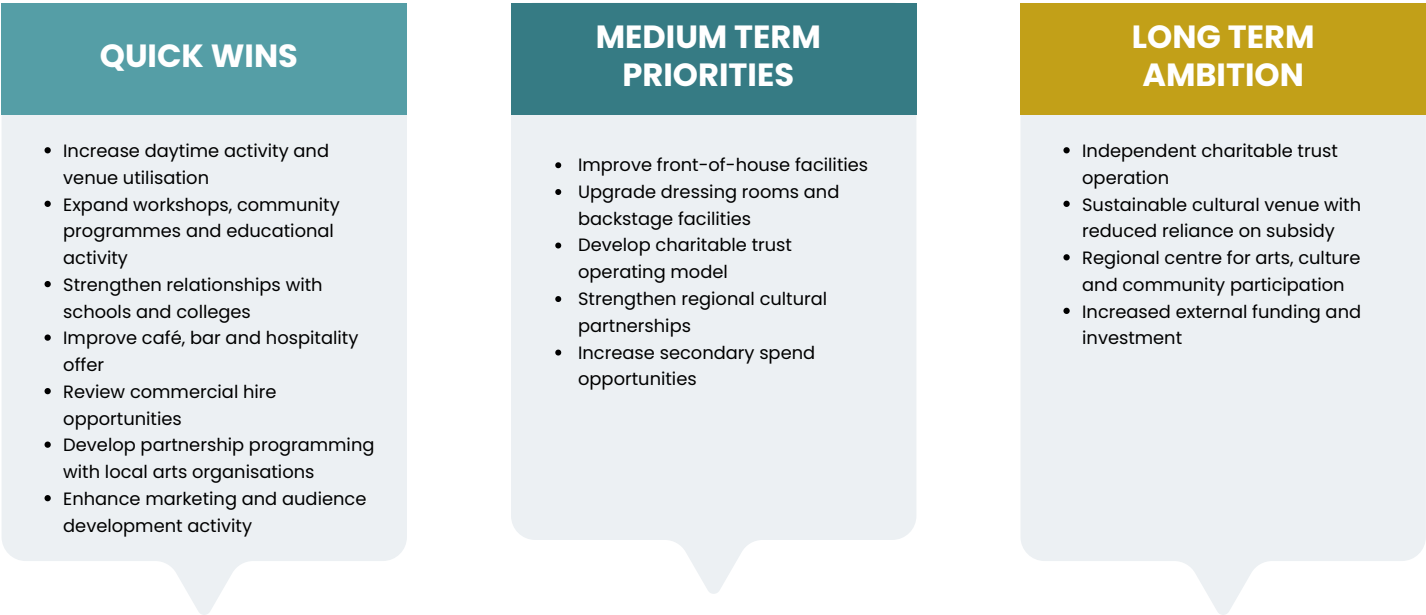
Key challenges

- High operating costs with reliance on subsidy
- Infrastructure and maintenance pressures
- Limited access to some grant funding streams
- Underutilisation during daytime hours

Key opportunities

- access to charitable, arts and external grant funding not readily available to the Council
- strengthened community participation, volunteer involvement and local partnerships
- increase utilisation of the venue
- clearer artistic and cultural identity
- improved commercial performance

Implementation Roadmap



Outcomes

- Increased attendance and participation
- Greater financial resilience
- Expanded cultural programme
- Improved access to external funding
- Enhanced contribution to town centre vitality

Community Asset Plan (CAP)

Community & Wellbeing Centre, Ewell



A key community asset providing wellbeing, support and social opportunities for older residents, vulnerable adults and those with health and mobility needs. activity and the evening economy.

Strategic vision

To create a modern, partnership-led wellbeing hub that supports prevention, health improvement, social connection and independent living, while operating more sustainably and efficiently.

Key challenges

- Limited commercial income opportunities
- Ongoing subsidy requirements
- Ageing accommodation
- Future uncertainty associated with Local Government Reorganisation
- Need for modernisation and service integration

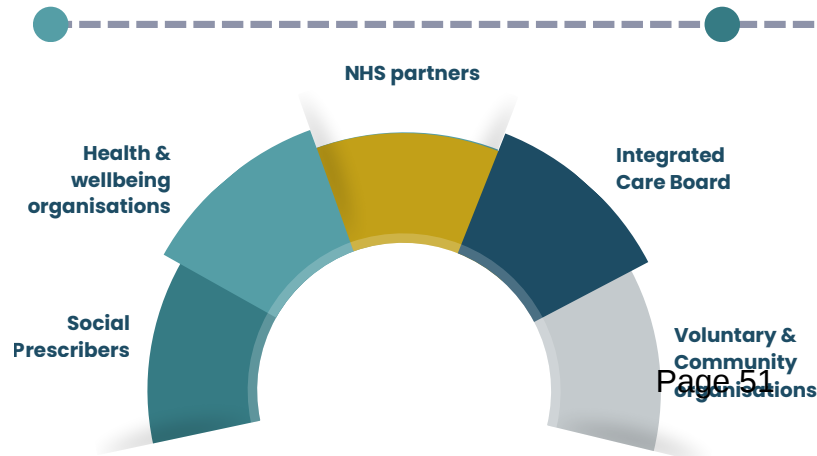
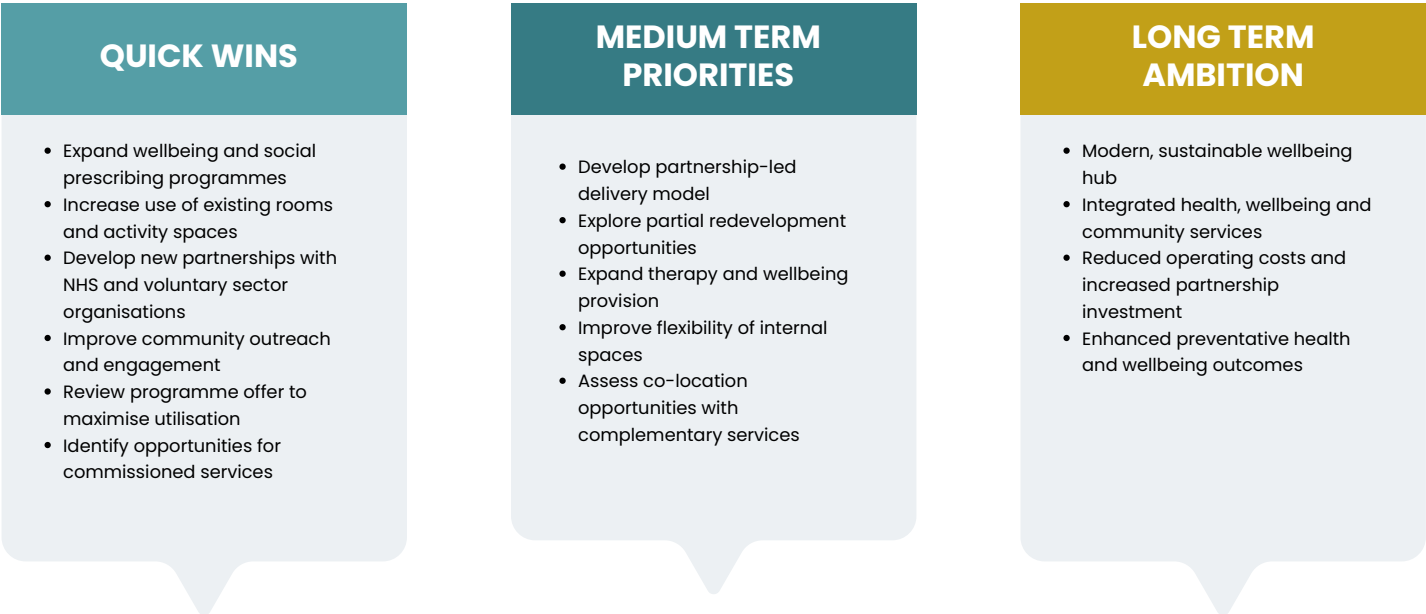
Ownership & operating model

Retain Council ownership of the core asset while transitioning management and operation to a purpose-led organisation through an appropriate lease or licence arrangement. Rationalise surplus or non-core elements of the assets.

Key opportunities

- Dedicated purpose-led organisation focused on health, wellbeing and community outcomes.
- Increased access to external funding, grants and partnership investment
- Rationalised asset footprint - reduce costs and generate capital receipts.
- Improve utilisation of retained space
- Strengthened partnerships
- Future-proofed asset

Implementation Roadmap



Outcomes

- Improved resident health and wellbeing
- Reduced social isolation
- Increased participation and service reach
- Greater partnership investment
- Stronger alignment with preventative health priorities



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1. Purpose of document

This business case sets out the rationale, scope, delivery approach, costs, risks and expected benefits for the Bourne Hall Museum Improvement and Strategic Development plan. The project is based on a phased investment proposal split between an initial phase one delivery phase of £125,000 and a subsequent strategic development phase which will be combined with the wider Bourne Hall Asset review.

2. Background

Bourne Hall Museum is a valued cultural asset within Epsom & Ewell, contributing to the Borough's heritage offer, education activity and wider community engagement. It operates within the wider Bourne Hall site alongside other community, library, café and event-based services. The Museum therefore forms part of a broader community and asset context rather than operating as a stand-alone facility.

The Community & Wellbeing Committee meeting on 9 June 2026 considered three strategic options for the future of Bourne Hall Museum. The current project follows that discussion and focuses on Option 2 – Invest in Improvement. This option proposes a structured plan of change informed by the Museum Service Review (May 2025) and Culture Peer Challenge (August 2025).

Links to both of these documents can be found in the main S&R committee report.

Recent reviews identified the need to strengthen the Museum's visibility, accessibility, visitor experience, operational efficiency, and long-term sustainability. They also highlighted the need for stronger visitor data, clearer governance, improved stakeholder engagement, and better alignment with wider strategic planning for Bourne Hall.

The context of Local Government Reorganisation (LGR) is significant. Services will increasingly need to evidence financial sustainability, governance clarity, operational efficiency and alignment with future delivery models. This project seeks to balance immediate visible improvements with longer-term strategic planning, enabling the Museum to demonstrate progress while building an evidence base for future decisions.

3. Project definition

3.1 Reasons for the project

The project is required because maintaining the current delivery model limits the Council's ability to address sustainability, accessibility and relevance challenges identified through recent reviews. The Museum has strong cultural and community value, but the current offer requires improvement to support future resilience, community relevance, and long-term viability.

- **Visitor experience:** the Museum needs visible and practical improvements to display, interpretation, accessibility, signage, and visitor navigation.
- **Accessibility and inclusion:** improvements are required to strengthen physical access, visitor navigation, and inclusivity within the visitor's offer.
- **Evidence and performance:** the Museum requires better visitor data, evaluation systems, and reporting dashboards to support future decision-making.
- **Operational readiness:** staff, volunteers, procedures and service standards need to be strengthened to support consistent delivery.
- **Strategic sustainability:** future governance, stewardship, location, funding and partnerships.
- **LGR readiness:** the Museum needs to be positioned positively in the context of future local government arrangements and broader asset planning.

- **Bourne Hall integration:** the Museum's role, footprint and long-term operating model must be considered alongside the wider Bourne Hall business plan and asset review.

3.2 Project objectives and target operating model

The overall objective is to deliver a phased plan that improves the Museum in the short term while creating the evidence and strategic framework required for a longer-term decision on governance, location, role, and sustainability.

- Deliver visible, practical improvements to the Museum between August 2026 and March 2027.
- Improve public-facing areas, displays, interpretation, accessibility, signage, and visitor navigation.
- Establish visitor data, performance monitoring, and evaluation systems to create a stronger evidence base.
- Improve operational consistency through staff training, volunteer development, and updated service standards.
- Undertake stakeholder, resident, Member, and partner engagement to inform future decisions.
- Ensure the Museum's future direction is aligned with LGR, the wider Bourne Hall asset strategy and the Council's legacy objectives.

The target operating model is a museum service that is more visible, accessible, data-informed, operationally consistent, and strategically positioned. It should have a clear role within Bourne Hall, a stronger evidence base, improved visitor engagement, and a defined route to a sustainable long-term governance and delivery model.

3.3 Assumptions

- Total investment of £125,000 to deliver phase 1 with future phases of funding combined with the wider Bourne Hall Business Plan
- Phase 1 is intended to run from August 2026 to March 2027 and focus on immediate delivery and visible improvements.
- Future phases will be post vesting day.
- The Museum will remain part of the wider Bourne Hall context and must be considered alongside wider asset planning.
- Stakeholder and community engagement will be required to shape both improvement of activity and long-term options.
- Finance, Property, ICT, Communications and relevant service leads will need to support development and delivery.
- Section 24 implications may need to be considered where financial commitments extend beyond vesting day or exceed relevant thresholds.
- Long-term footprint, accommodation, and back-of-house decisions are not resolved in Phase 1 and will be considered through the wider Bourne Hall asset review.

3.4 Project scope

The project's scope is deliberately phased. Phase 1 focuses on practical, visible, and deliverable improvements. Future phases focus on strategic direction, governance, and long-term sustainability.

In scope – Phase 1: Implementation and early improvements

- Programme and implementation planning, including a Museum Change Implementation Plan and alignment with wider Bourne Hall planning.
- Stakeholder and public engagement, including residents, visitors, volunteers, partners, Members and community interests.

- Displays and interpretation of improvements, including refreshed priority exhibition areas and improved storytelling.
- Accessibility improvements, including priority access measures, signage, and navigation enhancements.
- Digital and visitor data systems, including visitor tracking, CRM capability, and reporting dashboards.
- Operational improvements, including staff training, volunteer development, updated procedures, and service standards.
- Marketing and awareness activities to improve visibility, outreach and public engagement.

Out of scope / not for immediate resolution

- Detailed resolution of the Museum's long-term footprint, office accommodation and back-of-house arrangements.
- Major building-wide asset decisions that sit within the wider Bourne Hall asset review rather than the Museum improvement phase alone.
- Funding, investment and partnerships strategy to explore external funding and partner delivery routes.
- Collections care and accreditation review to support compliance and future options.
- Structured Member, stakeholder and partner engagement.
- Implementation planning for the preferred option, including roadmap, transition planning and delivery framework.

3.5 Stakeholders

Stakeholder group	Role / interest	Engagement approach
Members / Committees	Decision-making, oversight and strategic direction	Formal reports, briefings and engagement during options development
Senior leadership / Head of Service	Project ownership, governance and accountability	Project board updates and exception reporting
Museum staff and Bourne Hall team	Operational delivery, visitor experience and service standards	Workshops, operational meetings and training
Volunteers	Service support, community knowledge and visitor engagement	Consultation, role development and regular communications
Residents and visitors	Museum users and community beneficiaries	Surveys, engagement activity and feedback opportunities
Community groups and partners	Potential programming, outreach and partnership delivery	Targeted engagement and partnership discussions
Finance, Property, ICT and Communications	Technical support, financial controls, asset context, systems and communications	Input at planning and delivery stages
External museum/funding partners	Accreditation, sector advice, funding and best practice	Structured engagement during Phase 2

3.6 Benefits

- Improved visitor experience through refreshed displays, clearer interpretation, better signage and improved navigation.
- Improved accessibility and inclusion through priority access improvements and better visitor journey design.
- Stronger community relevance through stakeholder engagement, outreach and improved public visibility.
- Improved evidence base through visitor data systems, dashboards and performance reporting.
- Better operational consistency through staff training, volunteer development and clearer service standards.
- Protection of cultural value and support for Arts Council accreditation requirements through collections and accreditation review.
- Stronger financial sustainability through business case development, funding strategy and partnership opportunities.
- Alignment with LGR and wider Bourne Hall asset planning, supporting future decision-making and long-term stewardship.

- Clear decision pathway for Members, supported by evidence, appraisal and financial modelling

3.7 Disadvantages

- Additional short-term demand on staff, volunteers and support services during mobilisation and engagement activity.
- Potential disruption to some Museum areas during display, interpretation, access or operational improvement works.
- Stakeholder expectations may increase before long-term decisions on governance, location or investment are finalised.
- Financial exposure if delivery is not carefully managed within the phased programme and agreed governance controls.
- Risk that unresolved wider Bourne Hall asset matters may create uncertainty for the Museum's long-term model.

4. Business Case

The business case is built around a phased investment model. The rationale is to avoid delaying practical improvements while recognising that strategic issues such as future governance, stewardship, location, footprint, accommodation and financial sustainability require a Bourne Hall wide business plan.

The investment is intentionally split between early delivery and longer-term planning. Phase 1 establishes credibility, improves the visitor's offer and creates the data and engagement insight needed for the wider business planning for the future of Bourne Hall.

4.1 Deliverables

Phase	Workstream / deliverable	Description	Timing
Phase 1	Programme and implementation planning	Programme governance, Museum Change Implementation Plan and alignment to wider Bourne Hall planning.	Months 1–8
Phase 1	Stakeholder and public engagement	Consultation with residents, visitors, volunteers, partners, and key stakeholders.	Months 1–4
Phase 1	Digital and visitor data systems	Visitor tracking, CRM capability and reporting dashboards.	Months 1–5
Phase 1	Accessibility improvements	Priority access measures, signage and visitor navigation improvements.	Months 2–6
Phase 1	Operational improvements	Staff training, volunteer development and improved procedures/service standards.	Months 2–7
Phase 1	Displays and interpretation improvements	Refresh priority exhibition areas and improve storytelling and visitor engagement.	Months 3–8
Phase 1	Marketing and awareness	Targeted campaigns and outreach to improve visibility and engagement.	Months 4–8

4.2 Exclusions

- Final resolution of long-term office accommodation and back-of-house arrangements.
- Major Bourne Hall-wide capital or asset decisions not specifically within the Museum project scope.
- Closure planning, which could result following separate decision-making regarding the future of Bourne Hall
- Implementation of a new stewardship model

4.3 Constraints

- Funding approval and budget availability.
- Potential Section 24 consent requirements
- LGR timetable and uncertainty about future local government structures.
- Staff and volunteer capacity to support delivery and engagement activities.
- Availability of Finance, Property, ICT and Communications input at key stages.
- Maintaining Museum operations and public access while improvements are implemented.
- Bourne Hall site constraints, including shared spaces and wider asset planning dependencies.

4.4 Dependencies

- Wider Bourne Hall business plan and asset review.
- Financial approval and advice on funding route and revenue/capital treatment.
- Property Services input regarding site, location, space and accommodation implications.
- ICT input for visitor data systems, CRM capability and dashboard requirements.
- Communications input for stakeholder, resident and Member engagement.
- Museum accreditation and collections requirements, including any sector guidance or Arts Council expectations.
- Engagement with staff, volunteers, residents, Members and external partners.
- Future LGR and shadow authority decision-making arrangements.

4.5 Costs

Cost area	Description	Timing	Estimated cost
Phase 1 – Programme & Implementation Planning	Core programme management, implementation plan and alignment with wider Bourne Hall planning.	Aug 2026 – Mar 2027	£25,000
Phase 1 – Digital & Visitor Data	Visitor tracking, CRM capability and dashboards.	Months 1–5	£20,000
Phase 1 – Stakeholder & Public Engagement	Surveys, workshops, consultation and communications activity.	Months 1–4	£15,000
Phase 1 – Accessibility	Priority access, signage and navigation improvements.	Months 2–6	£18,000
Phase 1 – Operational Improvements	Training, volunteer development and improved processes.	Months 2–7	£10,000
Phase 1 – Displays & Interpretation	Refresh of priority exhibition areas and improved interpretation.	Months 3–8	£30,000
Phase 1 – Marketing & Awareness	Targeted campaigns and outreach.	Months 4–8	£7,000
Phase 1 total			£125,000

4.6 Initial project plan

Phase 1 is focused on delivery, credibility and evidence-building.

Period	Milestone / activity	Outcome
Phase 1 Months 1–2	Mobilisation and foundations: programme governance, implementation planning, stakeholder engagement launch, data system setup.	Project established and core delivery activity mobilised.
Phase 1 Months 2–4	Early delivery: access improvements, staff and volunteer development, visitor data system operational, early stakeholder insight.	Early progress visible and evidence capture underway.
Phase 1 Months 3–6	Visible improvements: priority displays and interpretation, accessibility and navigation enhancements; operational improvements embedded.	Public-facing improvement delivered and visitor journey strengthened.
Phase 1 Months 6–8	Consolidation and readiness: marketing activity, output review, feedback evaluation and evidence base for Phase 2.	Phase 1 benefits consolidated and strategic evidence prepared.

4.7 Project organisation structure

Role	Proposed responsibility	Named lead / status
Project Owner	Overall accountability, decision escalation, alignment to Council priorities and governance.	Head of Service – Linda Scott
Project Sponsor	Ensures project remains aligned with service and strategic objectives; supports issue resolution.	Director
Project Manager / Lead Officer	Day-to-day coordination, plan, risk log, reporting and delivery oversight.	Linda Scott / nominee – to be confirmed
Project Board	Cross-service oversight, delivery monitoring, risk review and decision support.	Venues, Finance, Property, ICT, Communications, Museum lead
Finance lead	Funding, budget monitoring, Section 24 implications and financial modelling support.	To be confirmed
Property lead	Asset, location, footprint and wider Bourne Hall implications.	To be confirmed
ICT / Data lead	Visitor data, CRM and dashboard system requirements.	To be confirmed
Communications lead	Stakeholder, resident and Member communications plan.	To be confirmed
Museum operational lead	Operational requirements, staff/volunteer engagement and visitor experience.	To be confirmed

4.8 Interfaces

- Bourne Hall venue operations and wider business planning.
- Property and asset management processes for the Bourne Hall site.
- Finance systems, budget monitoring and future funding approvals.
- ICT systems for visitor tracking, CRM functionality and dashboards.
- Communications channels for public, Member and stakeholder engagement.
- Museum accreditation, collections management and sector standards.
- LGR transition governance, including any Section 24 or shadow authority consent route.
- Potential external funders, museum networks and future delivery partners.

4.9 Risk log (initial)

Risk & consequences	Likelihood	Impact	Inherent risk	Mitigations & controls	Residual likelihood	Residual impact	Future actions
Insufficient evidence to support strategic decisions. Consequence: weak basis for Member decision-making and limited confidence in preferred option.	3	4	12	Build visitor data, stakeholder insight and performance evidence through Phase 1; undertake structured appraisal in Phase 2.	2	3	Establish monthly reporting dashboard and evidence review points.
Stakeholder disagreement on future direction. Consequence: delay, challenge or reduced confidence in options.	3	4	12	Early and structured engagement with Members, staff, volunteers, residents, partners and community interests.	2	3	Prepare stakeholder engagement and communications plan.
Financial viability concerns. Consequence: preferred model may not be sustainable or affordable.	3	4	12	Complete financial modelling, funding strategy and business case development before final recommendation.	2	3	Finance input to be built into project board and gateway reviews.
Asset and site complexity. Consequence: uncertainty around location, footprint, storage and accommodation requirements.	4	4	16	Align Museum planning with wider Bourne Hall asset strategy; defer detailed accommodation resolution to appropriate Phase 2 stage.	3	3	Property review and asset options analysis to be scheduled.
Collections or accreditation risk. Consequence: reputational or compliance impact.	3	4	12	Undertake collections care and accreditation review and embed findings into future options.	2	3	Confirm collections/accreditation workstream lead.
Implementation risk. Consequence: sound strategy but weak delivery or missed outputs.	3	3	9	Clear project governance, phased delivery and implementation planning before final decisions.	2	2	Agree delivery plan, owners and reporting cadence.
Section 24 / LGR approval risk. Consequence: requirement for consent may affect timing or implementation.	3	4	12	Seek early legal/finance advice on consent requirements and decision route.	2	3	Confirm governance route before commitment beyond relevant thresholds.
Capacity risk.	3	3	9	Programme	2	3	Map resource

Consequence: insufficient officer or operational capacity to deliver project alongside business-as- usual.				planning, prioritisation, project board oversight and use of specialist support where needed.			
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4.10 Exception process

Project exceptions should be escalated to the Project Owner where agreed tolerances are forecast to be exceeded. This includes material changes to cost, scope, timing, benefits, risks or governance requirements.

- Cost tolerance: any forecast overspend against approved phase budget, or material movement between workstreams, to be escalated.
- Time tolerance: any delay that affects Phase 1 completion by March 2027 or Phase 2 decision milestones to be escalated.
- Scope tolerance: any proposal to add or remove major deliverables to be approved through project governance.
- Risk tolerance: any risk assessed as high or increasing beyond agreed residual control levels to be escalated.
- Governance tolerance: any Section 24, Member decision or shadow authority approval issue to be escalated immediately.

5. Additional plans

5.1 Stakeholder engagement plan

Audience	Purpose	Method	Frequency / timing
Members	Ensure visibility of project progress, options and decision points.	Briefings, committee reports, engagement sessions.	At mobilisation, gateway points and prior to key decisions.
Museum staff and volunteers	Support operational change and capture practical insight.	Workshops, staff briefings, one-to-one discussions where needed.	During mobilisation and throughout Phase 1.
Residents and visitors	Understand needs, visitor experience, barriers and expectations.	Surveys, consultation, feedback forms, and engagement events.	Phase 1 Months 1–4 and as options develop.
Internal services	Ensure finance, property, ICT, communications and legal issues are addressed.	Project board, working groups, technical meetings.	Monthly or as required by workstream.
Partners and funders	Explore partnership, funding and sector support opportunities.	Targeted meetings, funding discussions, sector advice.	Phase 2 primarily, with early mapping in Phase 1.
Wider public / community groups	Strengthen awareness and community relevance.	Communications plan, targeted outreach, community engagement.	Phase 1 engagement and Phase 2 option testing.

5.2 Project quality plan

Quality will be monitored through agreed outputs, success measures and governance reporting. The project will measure both delivery outputs and customer / organisational impact.

- Phase 1 workstreams mobilised within the first two months.
- At least 75% of planned Phase 1 outputs delivered by the end of Month 8.
- Museum Change Implementation Plan produced and actively used.
- Visitor data system operational by Month 5.

- Monthly reporting dashboard established.
- Priority accessibility actions identified and completed.
- Stakeholder engagement completed during Months 1–4 and documented for future phases.
- Training and volunteer development activity delivered.

Bourne Hall Museum

Service Review and

Recommendations

May 2025

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1.0 Introduction

Epsom and Ewell Borough Council (EEBC) have commissioned [REDACTED] Heritage & Museum Services to carry out a review of Bourne Hall Museum's (BHM) strategic direction and services and develop a series of recommendations for a successful future.

There continues to be huge public support for museums in the UK with an [April 2024 YouGov Poll](#) for the National Museum Directors Council reporting that 89% of adults think that museums are important to UK culture and 76% of adults think that having a local museum adds value to their area.

Bourne Hall Museum opened in 1970 in Ewell Village as a local history museum for the borough of Epsom and Ewell. It is housed on the first floor of the striking Bourne Hall (BH) which is a community facility also housing the local library and New Surrey Performing Arts Library (operated by Surrey County Council), the Flying Saucer café, performance spaces and rooms for hire. There is a wide range of community focused activity based in BH and outdoors in its attractive gardens and park space.

Bourne Hall itself is a significant modern building which was designated Grade II by Historic England in 2015

*Bourne Hall Library and Social Centre, of 1967-70 by A. G. Sheppard Fidler and Associates, is listed at Grade II for the following principal reasons: * Architectural interest: a striking design, notable for its space-age flair and the generous, top-lit principal interior space; * Plan form: the circular layout is well-organised, legible and flexible; * Historic interest: as an ambitious example of the expansion of the library service and the integration of community facilities and disabled access.*

The museum collection of up to 15,000 objects covers social history, archaeology and local history material including photographs, ephemera, prints and postcards, covering the administrative boundaries of the Borough of Epsom and Ewell from 1937 onwards. The collection covers the domestic, social and commercial life of the area. It has strong collections around the history of the local traveller community and the Epsom Derby. The museum does not collect archive material which is more appropriately housed at the Surrey History Centre.

There are 1.5 FTE staff (a full time Curator and part time Education Officer post) who are supported by a group of regular volunteers and the wider Bourne Hall staff team.

Bourne Hall Museum is an Accredited Museum, meeting the nationally agreed standards set out in the [UK Museum Accreditation Scheme](#) (managed by Arts Council England) alongside [Spectrum, the UK Collections Management Standard](#) and the [Museums Association Code of Ethics](#). The museum submitted its last accreditation return in 2017 and can expect to receive an invitation to make a return (to demonstrate how it is meeting the standard) in the next 12-18 months.

2.0 Methodology

This work has been carried out in line with the proposal prepared for [REDACTED] Assistant Head of Service of Venues, Community commercial Services and [REDACTED], Arts, Culture and Heritage Programme Officer in February 2025.

It has included

- A desktop review of the museum's current planning framework
- A site visit to Bourne Hall Museum to carry out a baseline assessment
- One to one interviews with key council staff and elected members
- A workshop with museum, wider council staff and volunteers to assess current performance against the [AIM Hallmarks of Prospering Museums](#)
- Interviews with external stakeholders
 - [REDACTED] Surrey Cultural Partnership
 - [REDACTED], Surrey Museums Partnership
 - [REDACTED], Surrey and East Sussex, Museum Development South East

The author has taken every care to ensure information collected and given in this report is accurate, however inaccuracies or misunderstandings may have occurred.

The work on this report has been undertaken with support and insights from Epsom & Ewell Borough Council staff and the author appreciates their generous sharing of time and knowledge.

3.0 Internal Operating Environment

Epsom and Ewell Borough Council's most recent [Corporate Plan](#) has 6 priority themes

- Green & vibrant. A better place to live where people enjoy their surroundings
- Safe and well. A place where people feel safe, secure and lead healthy, fulfilling lives.
- Cultural and Creative. A centre for cultural and creative excellence and inspiration.
- Opportunity and Prosperity. A successful place with a strong, dynamic local economy where people can thrive.
- Smart and connected. Alive and connected socially, economically, geographically and digitally.
- Effective council. Engaging, responsive and resilient council.

The museum has a clear fit under the Cultural and Creative theme which includes the priority to

“Promote the borough’s rich history and heritage”

which has outcomes and activities that relate directly to the work of the museum.

The museum also has the potential to contribute to wider outcomes under the cultural and creative theme and under opportunity and prosperity “promote Epsom and Ewell as a great place to live, work and study”

In 2025-2027 Epsom and Ewell Borough Council are working to deliver an additional **7 priorities**. All the priorities are mindful of changes to local government that will follow this period and focus on ensuring a meaningful legacy for Epsom and Ewell residents.

Priority 7 is the **Future of the Museum**. This will report on a set of options for the future of the museum service.

It is hoped that this report will provide valuable background to inform these options as it details the challenges facing the museum, the opportunities that can be seized to improve and develop the service and the prioritisation that is essential to deliver this. There are foundational steps that need to be taken to ensure the successful future of the museum regardless of the organisational context. Appendix 1 provides a brief outline of the impact of possible options.

The council is currently consulting on its [Health and Wellbeing Strategy 2025-2027](#) which recognises “the positive impact that art, culture and heritage can have in improving our sense of wellbeing, relieving stress and bringing about a sense of connection and purpose”

The museum has enormous potential and a renewed commitment and focus to deliver on this strategic priority. There is an established evidence base in the wider sector for the value of museums to promote health and wellbeing (the [Culture, Health and Wellbeing Alliance](#) showcases examples of this type of work).

The museum also has an important role to play in developing the **tourism** offer in the borough as it showcases its rich history and stories, from prehistory to the Covid pandemic, presenting the legacy of Epsom and Ewell Borough Council and supporting and reflecting the future communities that it will serve. With excellent transport links it is an ideal destination for visitors from across Surrey and neighbouring London boroughs. Research undertaken in 2022 to understand the role of the cultural and creative industries in driving the local economy identified that cultural regeneration, of which a refreshed and forward thinking museum can be part, has a key role in attracting more visitors to the borough.

This research also informs the [Borough's Arts, Culture and Heritage Strategy 2023-2028](#) which has a natural synergy and overlap with the work of the museum as its vision seeks to evidence

- Pride in, and knowledge of the Borough's unique history and heritage
- A clear and compelling identity which excites and inspires
- A wide range of local events and activities for people to take part in
- A place where people work together for the benefit of the community

The strategy's vision is

"To grow the role of Epsom and Ewell as a centre for cultural, creative and heritage excellence both within Surrey and beyond. By 2028 the borough will be a place recognised for its vibrant cultural provision that appeals to, represents and engages with the people who live, work, visit or study within the community."

The Arts Culture and Heritage Strategy is also highlighted as a key tool for delivery of health and wellbeing priorities and the work of the museum in this area should be interwoven in this approach.

The new Forward Plan for the museum must outline its contribution to wider council priorities and ensure that opportunities to complement the Arts Culture and Heritage Strategy and other strategic priorities are embraced. It must also identify how, with investment to update and refresh the visitor offer, the museum can offer significant value as a lead museum service to a new east Surrey authority. It is already well placed to tell the rich stories of the history of Epsom and Ewell but it can also provide advice, support and act as a key partner and advocate for the wider museum and heritage community in the east of the county.

At present, the museum sits in the Commercial Services department of the council and is managed under Venues as part of the Bourne Hall team whilst Arts, Culture and Heritage is part of the Housing and Communities department and is managed under Communities as part of the Community Development team. Although the services sit in different departments, an integrated approach to planning is essential to ensure that maximum impact in these priorities areas is achieved. Future organisational structures should consider a closer alignment between these complementary services.

The museum team consists of 1.5 FTE staff, a FT Curator and PT Museum Assistant, supported by the wider Bourne Hall staff and museum volunteers. The museum's curator

[REDACTED] and the future operation of the museum, compliance with the national Accreditation Standard and capacity to support both the legacy of Epsom and Ewell's museum service and building for the future, will depend upon professional staffing levels being maintained.

4.0 External Operating Environment

The review has been commissioned at a time of change for Epsom and Ewell Borough Council.

The current structure of local government across Surrey will change from 1st April 2027 as local government is reorganised <https://www.surreylgrhub.org>

The future structure of local government in Surrey has not been decided at the time of writing but it is anticipated that either 2 or 3 unitary authorities will replace the current structure of Surrey County Council and 11 district or borough councils.

Within Surrey there is a strong, vibrant cultural sector ranging from large Arts Council supported National Portfolio Organisations through to grassroots community groups. The [Surrey Cultural Partnership](#) (SCP) is a collective from culture, heritage, local government, business, education, health and criminal justice working together to ensure that everyone in Surrey has the opportunity to participate in, engage with and contribute to extraordinary cultural activity, whoever they are and wherever they live.

SCP works with 380 cultural bodies across the county and has developed the [Surrey Cultural Strategy 2024-2034](#) which is focused on a vision that

By 2034 Surrey will be recognised as a confident, vibrant county that celebrates its rich cultural heritage and the creativity that shapes individual and community prosperity.

SCP provides an important support network for cultural practitioners and seeks to attract funding for culture. At present it is distributing the Heritage for All fund (from the National Lottery Heritage Fund) through the Community Foundation for Surrey.

There are over 40 museums in the county which are supported by the [Surrey Museums Partnership](#) (SMP). It provides a single point of contact to promote and support museums throughout the county and is funded through the County Council and District Councils (including EEBC). SMP encourages partnership working to support local, regional and national goals, advocate for the work of museums and offers funding and expertise to its members.

[Museum Development South East](#) is the Arts Council England funded body that supports the museum sector across the region, including Surrey. They offer access to professional expertise, networking, funding and development opportunities. The Surrey and East Sussex Museum Development Officer is the first point of contact for support for Bourne Hall museum

Within Epsom and Ewell there is a vibrant cultural and local history sector. The museum has well established working relationships with the Epsom and Ewell Archaeology and History Society and the Epsom and Ewell Local and Family History Centre (co-located in the library in Bourne Hall). Beyond history, there are a wealth of cultural organisations in the borough

including the University of the Creative Arts campus in Epsom, Nescot, Laine Theatre Arts and The Horton arts venue which houses a permanent exhibition on the history of Epsom's cluster of psychiatric hospitals.

It is essential that Bourne Hall Museum considers its potential role and purpose in the changing operating environment in local government in Surrey and that this is reflected in planning for 2025 onwards.

5.0 SWOT Analysis: current position

The SWOT analysis has been informed by the baseline assessment carried out on the site visit on 26-27th March 2025 and conversations with internal and external stakeholders.

STRENGTHS	WEAKNESSES
The collection is representative of key local stories A wealth of local history research has been carried out and can be drawn upon Good links with local history bodies Large scale events attract big crowds The museum club for children has a regular audience Loan boxes for schools are in regular use Popular walks programme Wider Bourne Hall team and community offer Access to green space Support of Epsom and Ewell Borough Council	No recent visitor data or research No recent non visitor consultation data Policies and plans required to meet the accreditation standard are not currently in place The collection does not reflect the contemporary population of E+E Collections database is not Spectrum compliant The name of museum does not make its offer clear The museum displays are dated and lack interactivity Small staff team of 1.5 FTE Limited marketing/social media presence
OPPORTUNITIES	THREATS
LGR presents an opportunity for the museum to present the legacy of Epsom and Ewell Borough Council and be a lead service museums and heritage for the east of the county. Provide an advisory and support service for volunteer run museums in the east of the county. Engage more deeply with the work of the Surrey Cultural Partnership Access funding and support through the Surrey Museums Partnership and Museum Development SE Invest in and refresh the visitor offer to play a key role in the area's tourism offer. Promote the museum (and schools offer) into neighbouring London boroughs	Museum Curator role [REDACTED] LGR outcomes for the museum are uncertain (elections for the shadow councils take place in May 2026). LGR regulations will affect the ability of EEBC to make decisions re investment in the museum from Sept 2025 onwards. Being ready for the next accreditation return Succession planning (volunteers) Unable to evidence the impact of the museum without more visitor data / consultation. Absence of strong collections care (eg environmental conditions and pest monitoring) threatens collection condition. High light levels for collections on display.

Build relationships with funders and secure external grant funding for priority work Courses for adults – eg around wellbeing themes or traditional skills- can also be income generating Work in partnership with the library service More focused work with partners in E+E	Weaknesses in the documentation of collection could compromise accountability of action is not taken. The position of the museum in BH (and signage) means it is hidden from view/ not strongly promoted.
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6.0 Hallmarks Analysis and Recommendations

The AIM Hallmarks of Prospering Museums are an excellent benchmarking and development tool to review the current position of the museum and consider and order priority areas for action. They can be used effectively by museums with independent/charitable governance structures and those managed by local authorities and universities.

They can be viewed online at <https://aim-museums.co.uk/helping-organisations/aim-hallmarks/>

The analysis and recommendations are based on the Hallmarks workshop carried out with staff and volunteers on 27th March 2025, the consultant's baseline assessment work and conversations with internal and external stakeholders.



6.1 HALLMARK: PURPOSE

The current statement of purpose is

“Bourne Hall Museum works to promote the understanding of history in Epsom and Ewell by helping and encouraging people to encounter objects and pictures from the past”

Definition: know, articulate and embrace your purpose

You have a clear, compelling and people- oriented purpose that is shared by everyone in your organisation.

You actively use it to keep your organisation on course as it flexes and adapts to changes.

Self assessment questions

- How compelling is our purpose?
- How relevant is our purpose to a wide range of people?
- How well is it shared by everyone in our organisation?

Workshop feedback

- The bones are good but it needs va va voom
- It is maybe a bit passive eg talks about ‘encounter’
- The objects are evidence to help tell the stories of the people of E+E
- It acts as a blurb for the museum
- Needs to be more pithy
- Reflect demographics that have changed
- Promote sense of pride and sense of place
- The purpose needs revising
- Need to revisit even if it remains the same
- Need to encourage new people and new topics to bring people in
- Purpose not very well known – ‘didn’t know our purpose until we turned up today’
- Because we are a LA we can be too wordy
- Bourne Hall as whole product / museum
- The museum service/ museum site

6.1.1 Recommendations

It is considered good practice to revisit a museum's mission or vision at the beginning of each new planning cycle and the Bourne Hall statement of purpose is overdue for a review. This is a valuable opportunity to consider what the museum is aiming to achieve in the future and the impact it will have on its users. This will inform the approach for all the museum's management policies and plans.

P1 Review the museum's statement of purpose ahead of its next Accreditation return.

The review should

- **Ensure that a new statement has a strategic fit with wider corporate priorities**
- **Involve consultation with staff, volunteers, stakeholders and the wider community.**
- **Consider the relationship of the museum to Bourne Hall as a whole**
- **Consider the name of the museum- does it clearly communicate what the museum is about or the reach it has across the borough as a whole?**

6.2 Hallmark: LEADERSHIP & CULTURE

Definition: create an organisational culture that can readily adapt and respond.

The leadership of your organisation is clear, directed, delegates freely and fosters a positive culture that is open to new ideas and ready to seize opportunities.

Your organisation is independent-thinking and entrepreneurial. It is focused collectively on outcomes. Key information on performance is shared within the organisation.

Self assessment questions

- How clear is everyone in the organisation about our intended outcomes and progress towards them?
- How effective are we at seizing opportunities and being entrepreneurial?

Workshop Feedback

- Our Forward Plan needs to be rewritten
- People are not clear on intended outcomes and progress
- Museum staff and volunteers are clear on intended outcomes but not wider Bourne Hall or council staff
- Outcomes and progress needs to be shared with the wider organisation
- There are no structured targets or KPIs
- There is good liaison with volunteer groups and history societies
- We have the seeds to be entrepreneurial
- Local government reorganisation will have a massive impact
- Our hands can be tied because we are a LA

- We need more collaboration with the rest of BH
- There are opportunities to work with the fashion, textile and business courses at the University of Creative Arts in Epsom.

6.2.1 Recommendations

L&C1 Prepare the museum for the future by developing a new, Accreditation compliant, Forward Plan.

The plan should

- Be informed by stakeholder consultation (internal and external)
- Be aligned to wider council priorities
- Consider shared goals with wider Bourne Hall and the Arts, Culture and Heritage Service
- Meet the [Accreditation Scheme requirements for a Forward Plan](#)
- Acknowledge the need to adapt to the changes that local government reorganisation will bring
- Be communicated and shared with staff and volunteers.
- Ensure progress and outcomes are measured and shared/discussed

6.3 Hallmark: GOVERNANCE

Definition: consciously practice good governance following Charity Commission and AIM Guidance.

All trustees are proactive advocates for the organisation and its purpose. They focus on strategic and significant issues. They avoid conflicts of interest and always wear only one hat at a time.

The trustees and senior staff or volunteers understand their different roles and work well together towards the purpose.

This Hallmark is written to align to the charitable status of independent museums but the self assessment questions have been adapted to fit with the governance of Bourne Hall Museum as a local authority run museum.

Self assessment questions

- How well do elected members, staff and volunteers work together?
- How well does our work fit with the Arts, Culture and Library Strategy and wider council priorities?

Workshop Feedback

- It's a small team at E+E. We all work well together but are stretched.
- Council decision making structures and processes can be challenging
- We all tend to work according to individual perspectives; we need to work towards common goals
- Things can be disjointed between BH and E+E BC
- The Arts, Culture and Heritage Strategy works well
- There are wider challenges with volunteer recruitment post Covid

6.3.1 Recommendations

G1 The work of the museum must be clearly aligned to wider strategic priorities. This can be done through the development of the aims and objectives that direct the museum's new Forward Plan and underpin its statement of purpose.

G2. The museum service and arts, culture and heritage sit in separate council departments. There are natural synergies between these areas of work and, where possible, a joined up approach to planning and delivery should be explored to ensure that resources and impact are maximised.

G3. The museum is supported by long serving volunteers across a range of roles. Succession planning and consideration of new volunteer roles and models (eg remote and one off volunteering opportunities) should be explored.

The [Heritage Volunteering Group](#) offers guidance, inspiration and case studies on developing and implementing rewarding heritage volunteering opportunities.

6.4 Hallmark: FINANCE

Definition: be financially resilient and well managed as a charitable business.

The organisation nurtures a diversity of income sources. Some of these are predictable and it has sound business planning skills.

All leaders understand the key drivers of their business model. The organisation actively identifies, develops and utilises its assets to generate income in order to fulfil its purpose.

This Hallmark is written for a museum operating in a charity framework rather than as a local government service however similar but different financial challenges are also present for local government museums and this benchmark was used to look at where there are additional funding opportunities for Bourne Hall Museum.

Self assessment questions

- What are our financial challenges and where are there funding opportunities?

Workshop Feedback

- Challenges
 - We need enough money to deliver a (new) forward plan
 - There is a need to invest in the museum
 - Being a LA restricts access to some funding opportunities
 - There are challenges around budgets reducing
 - We need to demonstrate economic and social value
 - We don't charge for exhibitions
- Opportunities
 - Links to local businesses/organisations for possible sponsorship and grants
 - Museum shop
 - An online shop
 - Charging a refundable deposit for damages to school loan boxes
 - Look at wider grant opportunities for funding

6.4.1 Recommendations

F1 A resource plan needs to be developed to demonstrate how the new Forward Plan can be delivered. This should scope the resource required (financial, staff, expertise) and identify where this can be met from.

F2 Applying for targeted external grant funding will be essential for the museum to maintain its accredited status and develop its visitor offer.

It is understood that an application has already applied for a Surrey Museums Partnership grant for collections work but further grants will be required. This museum does not have a track record with a range of funders so relationships will need to be developed.

Funders that are aligned to the areas that Bourne Hall Museum will need to resource (in addition to the SMP) are

- [Museum Development South East](#) has a range of funds available in this financial year. An early conversation with the Surrey Museum Development Officer, [REDACTED], is recommended to help maximise these opportunities.
- Bourne Hall Museum would be eligible for the [Association of Independent Museums Collections Care and Conservation and Museum Fundamentals grants](#) if it became a member.
- [Arts Council England National Lottery Project Grants](#) have different criteria for projects under and over £30K, aligned to its Let's Create Strategy. BHM could form part of a combined arts application or a stand alone museum application.
- [The Community Foundation for Surrey is distributing National Lottery Heritage Fund grants in its 'Heritage for All' fund.](#) This is a response to the Surrey Cultural Strategy and aims to help a wider range of people benefit from and engage with heritage in Surrey. Access to museums and their collections is a core theme for the fund. Local authorities are not eligible for support directly but can partner with an eligible body.
- [NLHF](#) offers grants from £10,000 to £10 million pounds and BHM should start to consider where NLHF might start to help it realise its ambitions. The first step is to access advice and support from your regional office <https://www.heritagefund.org.uk/in-your-area/london-south>

It is noted that applying for funding is a time consuming activity. It is essential that the limited staff time available is directed to applications that focus on priorities identified in the forward plan and where there is a good match with funder priorities.

The Association of Independent Museums (AIM) has a good resource for helping to write effective grant applications <https://aim-museums.co.uk/writing-a-good-application/>

F3 BHM already generates income through its shop and the museum club. Further income generating opportunities should be explored as time and capacity allows and balanced against any access considerations.

6.5 Hallmark: INNOVATION

Definition: be adaptive, resourceful and prepared to take risks
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The organisation encourages innovation and creative thinking. It adapts, invests and takes planned risks, in order to find new and better ways to achieve its purpose.

No one accepts that the status quo is fixed and unchangeable.

Self assessment question

- To what extent do we actively look for new ways of achieving our purpose?

Workshop Feedback

- We don't look for new ways.
- It is hard to get people to go up to the first floor of BH

Ideas

- Look at what is happening in other museums, what is working elsewhere (eg across Surrey)
- More market research needed
- Themes with outside speakers
- Open up events to bring in different people
- Create some new walks
- AI
- Opportunities with social media
- Become more neurodiverse friendly- eg quiet open early sessions
- Consider the best space for the museum
- Connect to themes of creativity, culture, heritage, wellbeing

6.5.1 Recommendations

Becoming open to new ways of delivering the service and connecting with new audiences requires a new mindset for the museum. This could be tested in, for example, considering options for a new name for the museum, developing new interpretation, offering new events and activities, developing new partnerships. There was no shortage of ideas when this was discussed in the workshop.

INN1 The new forward plan should

- **Identify areas where new ways of working could be beneficial**
- **Research and identify best practice and good ideas across the museum sector that can be tested at BMH**
- **Be ready to pilot and evaluate new ways of working**
- **Consider whether external funders can support this work**

6.6 Hallmark: COLLECTIONS

Definition: collect, guard and make accessible your collection.

The organisation understands the potential of its collection. It recognises what constitutes its heritage assets - including stories, knowledge and places, as well as objects.

It seeks to fulfil its purpose through enabling the broadest possible audience to engage fully with all its heritage assets and caring for them in line with best practice.

Self assessment questions

- How strong is the link between our collections and our purpose?
- How well do we use our collections to benefit a broad range of people (and engage with new people?)
- To what extent does our collections care meet best practice standards?

Workshop feedback

- There's a strong link between our collections and our purpose
- Collections relate to the borough of E+E- mostly local history and archaeology
- We could expand the collection too- more contemporary collecting
- The new Collections Development Policy is an opportunity
- The school loan boxes are used to engage young people
- We could work with Nescot on tech history
- Walks and event and re-enactors engage people with the collections
- We change the display cases
- Could also do memory boxes from the collection
- Room D onsite store needs work

This area of work is guided by sector wide standards including the UK Museum Accreditation Scheme (managed by Arts Council England), Spectrum, the UK Collections Management Standard (managed by Collections Trust) and the Museums Association Code of Ethics

6.6.1 Recommendations

The collection is strongly aligned to Epsom and Ewell and has the ability to tell key stories about the history of its places and people. There is potential to develop it further to tell more recent stories of the area and the people who live here today.

Considerable work has been undertaken to research local history and form strong partnerships with local history and archaeology groups.

The most important issue to address is that the museum does not have a suite of robust, accreditation compliant collections management policies, plans and procedures in place to underpin the long term care and access to the collection. This is a risk to the council's ability to be accountable for and care for the collection.

The Accreditation standard requires that the core museum collections management policies are approved by the museum's governing body.

COLL1 The priority is to ensure that Accreditation compliant collections management policies, plans and procedures are in place for the museum collection ahead of its next Accreditation return.

This is an opportunity to review where current practice meets Accreditation requirements and sector standards. This can be reflected in the new Forward Plan for the museum.

COLL2 Review and develop a new Collections Development Policy. This should follow the Arts Council England policy template.

COLL3 Develop a Documentation Policy to underpin accountability for the collection, indicate the standards that will be followed, explain how people can access information about the collection and demonstrate how measures are in place to ensure the long term security of documentation records (physical and digital)

COLL4 Review the museum's current position against the Spectrum primary procedures and write a Documentation Plan to address any gaps.

COLL5 Develop a Collections Care and Conservation Policy and Plan for the museum, based on a review of current practice. Benchmarks in Collections Care can be used to assess the current position and develop an improvement plan.

COLL6 Accreditation requires that a museum has an Access Policy and Plan in place- this should include access to the collection and collections information.

6.7 Hallmark: VISITOR FOCUS

Definition: understand your visitors and supporters-especially the visitor experience- and invest in its improvement.

The organisation actively seeks to understand its current and potential visitors, customers and supporters, and responds to the needs it identifies, when delivering the organisation's purpose.

It continually measures its quality and its success in delivering a first-class visitor experience to the broadest possible audience and seeks to adapt whenever necessary

Self assessment questions

- How effective are we at delivering a first class visitor experience?
- How well do we understand our current audiences – their needs and motivations?
- How well do we understand our potential audiences and their needs and motivations?

Workshop Feedback

- We could improve promotional materials
- We give everyone 1st class treatment (volunteer perspective)
- The museum is accessible by lift
- We need more and bolder advertising in Bourne Hall and in the park
- We could reflect the history of the hospitals in Horton and the impact on the community now
- We need to sort out some form of visitor survey
- Do surveys [when](#) we have events
- We need to identify audience needs + wants in the museum
- We don't completely understand our current audiences

Having a focus on who is visiting a museum (and who is not visiting) alongside working to ensure the best possible visitor experience is essential for the success of any museum.

A key finding of this review was that BHM does not have any current visitor data or insights on who and how many people are visiting. There is some information about attendance at the museum club and use of school loan boxes but no data on general visitor numbers or qualitative insights on the visitor experience. AIM have a [useful publication](#) for smaller museums on conducting visitor research

The Accreditation standard includes the requirement to evidence how you understand who uses and doesn't use your museum and to use this data to plan improvements to your museum offer.

6.7.1 Recommendations

Visitor research

VF1 Carry out research to understand who is and isn't using the museum at present and understand what people are interested in e.g. what they like about the current museum and what they would like to see in the future (it is understood that focus groups around the borough have already been planned)

VF2 Put systems in place to systematically record and review visitor numbers (including loan box hires, other engagement with schools, museum club attendance and for events)

VF3 Include the findings and actions from this research in the forward plan to identify target audience groups and areas for improvement.

Visitor experience

There is a wealth of information available on best practice in visitor experience that BHM can draw on to plan changes. AIM has this [useful publication](#) that can be drawn upon.

The current Bourne Hall Museum visitor experience benefits from being co-located with the other services in the building but is hindered by not being a strongly identified and signposted presence on the first floor.

The displays themselves are tailored to visitors who are informed and engaged with local history and lack interpretation and interactivity for different audience groups.

VF4 Use the visitor research to pilot and evaluate new approaches to interpretation at low cost

VF5 Gather evidence to inform funding applications to upgrade interpretation in the museum to tell new stories for new audiences.

6.8 Hallmark: AWARENESS & NETWORKS

Definition: take part in varied, active networks and partnership and have good external awareness.

The organisation constantly looks ahead, including outside of itself to the broader heritage and tourism sectors. It is aware of trends and anticipates challenges.

It makes itself well-known, relevant to and visible within its immediate community and has a range of other, wider networks.

Self assessment questions

- How effectively do we identify external developments that might affect us?
- How well do we know our community?
- How well known are we by our community?
- How good are we at making connections with wider networks?

Workshop Feedback

- We have good links to the Surrey History Centre
- Good links to history groups in the Borough
- [REDACTED] has been at the centre of the museum's networks. Will need to think about continuity etc when he retires
- Suspect that the museum is not well known by the community
- I don't think that we are involved in place making
- We could use the Borough Insight publication to raise awareness

6.8.1 Recommendations

There are well established and effective wider cultural and museum networks in Surrey, in particular the Surrey Cultural Partnership (SCP) and Surrey Museums Partnership (SMP). The museum is also an established partner with local history organisations and networks and other cultural bodies in Epsom and Ewell.

There is also a national network, the [English Civic Museums Network](#), which advocates for and supports civic museums across England. The network campaigned successfully for government support for the [Museum Renewal Fund](#) for museums whose financial position is of significant concern. It is a network that it is recommended to track and maintain awareness of.

With local government reorganisation due to take effect from April 2027 there is the potential for the museum to develop as the lead local authority museum service in the east of the county and so partnership and networks that would support this work should be prioritised.

A&N1 Map links to current partners and networks and assess how well these are currently used and could be used further to maximise the museum's impact

A&N2 Consider potential new partnerships that could be developed to deliver priorities identified in the forward plan

A&N3 Ensure that the museum is involved in wider conversations across Surrey about the role and shape of museums in new local authority areas.

6.9 Hallmark: TACKLING INEQUALITY

Definition: the organisation is inclusive and challenges prejudice, discrimination and racism.

The organisation recognises its responsibility to carry out its purpose for the benefit of all, striving to make a positive impact and represent all communities. It understands and takes action to challenge prejudice and inequality and create equality of opportunity for its workforce and its users. It acknowledges that the connections between our nation's history and heritage are an invaluable tool in the fight against discrimination.

Self assessment question

- How effectively does our organisation listen to and act on a range of voices from diverse backgrounds?

Workshop Feedback

- We need to survey our visitors- we have some qualitative but not quantitative feedback
- Be mindful of digital exclusion in all aspects of our work
- We need to be more inclusive of protected groups (eg types of exhibitions)
- Schools are very diverse and regularly use the museum
- We need inclusive events across BH
- Consider accessibility and interpretation
- Need to plan a calendar of work a year ahead
- Look at examples of work done by the National Trust
- Example 'This is Me' (ask Susan)

6.9.1 Recommendations

The workshop discussion established there had not been a proactive approach to date but ideas were shared for future work.

TI 1/ VF Ensure that visitor research includes a range of diverse voices that can inform future work

TI2 The Accreditation requirements 7.1 and 7.2 for a museum Access Policy and Plan, informed by an access assessment, should cover the museum's commitment to providing equitable access to staff, volunteers and visitors and outline how this will be achieved. This should be seen as an opportunity to explore how BHM can actively tackle inequalities in the communities it serves.

6.10 Hallmark: ENVIRONMENTAL SUSTAINABILITY

This Hallmark is still under development however the Accreditation standard also asks that museums consider their work around environmental sustainability in their forward plan. It is also one of Arts Council England's Investment Principles.

Epsom & Ewell Borough Council's Climate Action Plan should guide this work and its impact can already be seen in the Bourne Hall improvement works to install solar panels and more energy efficient double glazed windows.

There are opportunities for the museum to review its own carbon footprint and consider potential for improvements as part of the development of the forward plan.

Museum Development South East offers a training and support programme around carbon literacy <https://mdse.org.uk/carbon-literacy-and-climate-action-programme/> and there is also a [carbon literacy toolkit for museums](#) that can be used independently.

Self assessment question

- What are the opportunities for the museum to reduce its carbon footprint and increase its environmental sustainability?

Workshop Feedback

- LED lighting in the gallery
- Think about use of plastic in archaeological archives
- Events for local people- encourage use of public transport, more park + ride
- Increase energy efficiency of the building
- Be less paper heavy + recycle

6.10.1 Recommendation

ES1 Use the MD South East carbon literacy toolkit to identify steps that BHM can take to reduce its carbon footprint. Embed this work in the Forward Plan.

7.0 Action Plan: summary of recommendations

The first priority for the museum to put policies, plans and procedures in place to ensure compliance with the national standard for museums, Accreditation. This is essential to guarantee good practice in day to day operations and to maintain public and stakeholder trust and accountability to realise its full potential.

The recommendations address these priority areas:

- Meeting the Accreditation standard in order to maintain Bourne Hall Museum's fully Accredited status when next invited to make a return to Arts Council England.
- Aligning the work of the museum to Epsom and Ewell Borough Council strategic priorities and being able to demonstrate how the museum is meeting the needs of the communities it serves.
- Ensuring that the museum is in a robust position to be able to act as a lead service for museums in the east of the county following local government reorganisation.

The timescales are informed by the likely submission date for an Accreditation return in the next 12- 18 months and the date of 1 April 2027 for local government reorganisation in Surrey.

- Short term in 6 to 9 months
- Medium term in 9 to 18 months
- Long term in 18 months to 2 years

Number	Recommendation	Timescale
Short term recommendations- in 6 to 9 months		
P1	Review the museum's statement of purpose ahead of its next Accreditation return.	Short

	This should ensure that the historic legacy of the borough under Epsom and Ewell Borough Council is secured and built on for the future.	
G1	The work of the museum must be clearly aligned to wider strategic priorities through the development of the aims and objectives that direct the museum's new Forward Plan and underpin its statement of purpose.	Short (and ongoing)
G2	The museum service and arts, culture and heritage sit in separate council departments. Where possible, a joined up approach to planning and delivery should be explored to ensure that resources and impact are maximised.	Short and ongoing
VF1	Carry out research to understand who is and isn't using the museum at present and understand what people are interested in.	Short (and ongoing)
TI1 /VF1	Ensure that visitor research includes a range of diverse voices that can inform future work	Short (and ongoing)
VF2	Put systems in place to systematically record and review visitor numbers (including loan box hires, other engagement with schools, museum club attendance and for events)	Short
A&N1	Map links to current partners and networks and assess how well these are currently used and could be used further to maximise the museum's impact	Short
COLL2	Review and develop a new Collections Development Policy. This should follow the Arts Council England policy template.	Short
Medium term recommendations- in 9 to 18 months		
L&C1:	Prepare the museum for the future by developing a new, Accreditation compliant, Forward Plan.	Medium
F1	A resource plan needs to be developed to demonstrate how the new Forward Plan can be delivered. This should scope the resource required (financial, staff, expertise) and identify where this can be met from.	Medium
INN 1	The new forward plan should	Medium and ongoing

	• Identify areas where new ways of working could be beneficial • Research and identify best practice and good ideas across the museum sector that can be tested at BMH • Be ready to pilot and evaluate new ways of working • Consider whether external funders can support this work	
COLL1	The priority is to ensure that Accreditation compliant collections management policies, plans and procedures are in place for the museum collection ahead of its next Accreditation return.	Medium
COLL3	Develop a Documentation Policy to underpin accountability for the collection, indicate the standards that will be followed, explain how people can access information about the collection and demonstrate how measures are in place to ensure the long term security of documentation records (physical and digital)	Medium
COLL4	Review the museum's current position against the Spectrum primary procedures and write a Documentation Plan to address any gaps.	Medium
COLL5	Develop a Collections Care and Conservation Policy and Plan for the museum, based on a review of current practice.	Medium
COLL6/TI2	Accreditation requires that a museum has an Access Policy and Plan in place- this should include access to the collection and collections information.	Medium
TI2/COLL6	The Accreditation requirements 7.1 and 7.2 for a museum Access Policy and Plan, informed by an access assessment, should cover the museum's commitment to providing equitable access to staff, volunteers and visitors and outline how this will be achieved. This should be seen as an opportunity to explore how BHM can actively tackle inequalities in the communities it serves.	Medium to Long

VF3	Include the findings and actions from this research in the forward plan to identify target audience groups and areas for improvement.	Medium to Long
VF4	Use the visitor research to pilot and evaluate new approaches to interpretation at low cost	Medium to Long
VF5	Gather evidence to inform funding applications to upgrade interpretation in the museum to tell new stories for new audiences.	Medium to Long
Long term recommendations- 18 months- 2 years		
G3	The museum is supported by long serving volunteers across a range of roles. Succession planning and consideration of new volunteer roles and models (eg remote and one off volunteering opportunities) should be explored.	Long
F3	F3 BHM already generates income through its shop and the museum club. Further income generating opportunities should be explored as time and capacity allows and balanced against any access considerations.	Long
ES1	Use the MD South East carbon literacy toolkit to identify steps that BHM can take to reduce its carbon footprint. Commit to this work in the Forward Plan.	Long
Ongoing actions		
F2	Applying for targeted external grant funding will be essential for the museum to maintain its accredited status and develop its visitor offer.	Ongoing
A&N2	Consider potential new partnerships that could be developed to deliver priorities identified in the forward plan	Ongoing
A&N3	Ensure that the museum is involved in wider conversations across Surrey about the role and shape of museums in new local authority areas.	Ongoing

8.0 APPENDIX 1

Summary of future options

This report has been written with the assumption that the ownership and responsibility for the museum assets (specifically its collection) and operation will pass to the successor authority to Epsom and Ewell Borough Council from 1st April 2027.

Epsom and Ewell Borough Council priority 7 will look at future options for the museum service and so short appraisals of future options in terms of governance are included here. This type of options appraisal demands detailed and expert guidance and these additional needs are highlighted here. The Local Government Association has [specific guidance](#) on consideration of different operating models for museums which should be consulted. Advice should also be sought from Arts Council England (the national development body for museums) through Museum Development South East.

It must be understood that **any** option for a successful future for the museum will be dependent on the focus and investment outlined in the recommendations of this report so that it can effectively build on the legacy of the work done by Epsom and Ewell Borough Council and serve, inspire and delight both local residents and visitors.

This does not constitute legal advice which should be sought to correctly determine the implications of future options.

Transfer to the successor authority

The museum and its collection have a valuable future role to play in ensuring that the history and stories of Epsom and Ewell (and its museum collection of around 15,000 objects) are preserved and shared as a legacy of Epsom and Ewell Borough Council, not least in its achievement in developing the museum itself.

There is ongoing and recent precedent for this type of transfer being undertaken successfully, for example [The Dock Museum in Barrow in Furness](#) moved from district council operation under Barrow Borough Council (who established it in 1994) to Westmorland and Furness Council, the new unitary authority, on 1st April 2023. The [Grosvenor Museum in Chester](#) moved from Chester City Council to Cheshire West and Chester Council in 2009.

To realise its full potential Bourne Hall Museum will need the focus and investment outlined in the recommendations in this report in order to continue to comply with national standards and to proactively serve its communities and act as a focus for visitors to the area.

There is an opportunity in the successor authority to act as a lead museum for the area, offering support and guidance to volunteer run museums across the east of the county.

There may be public concerns about the future of local services under a new authority but good communications from the new authority to reassure residents about continuity of the

service and the long term security of museum collections can help maintain public trust. The collection and stories relating to Epsom and Ewell will remain as a core foundation of the museum and its work with visitors.

Transfer to a new body

It is possible that Epsom and Ewell Borough Council could consider whether the museum and its users would be better served by governance under a different authority (eg a parish or town council) or as an independent, charitable museum with an associated governance structure.

This would need detailed legal examination, advice and public consultation. The museum collection is a significant, long term public asset and any change in ownership outside the successor authority to EEBC would need existing legislation to be checked for any restrictive covenants and new legal agreements to be drafted and agreed for future arrangements. The [Museums Association Code of Ethics](#) would need to be followed to ensure public benefit is maintained and the good stewardship of the collection is assured.

Arts Council England would need to be informed to ensure continued compliance with the Accreditation Standard. This type of change of governance would require a new application to the scheme.

The long term financial sustainability of the museum would also need careful planning. Its current overheads are low as it is co-located in Bourne Hall and employs only 1.5 FTE. If the museum was to move to new premises or to be a tenant of a new body there would be both opportunity costs and new property costs to meet. There could be the potential for additional staffing costs as the needs of the museum are also served by the wider Bourne hall staff team. The potential for joined up working with, for example, arts and culture and health and wellbeing would be reduced if responsibility for these was in separate bodies.

The ongoing needs of the collection and the museum, as outlined in this report, would still remain—not least the need for investment to develop and grow existing and new audiences.

The current museum is the repository for archaeological archives for Epsom and Ewell; this would need to be reviewed and agreed with the new local authority structure and resources allocated for their long term care and access.

A change of this magnitude would require not only extensive planning work to ensure that legal and ethical duties are met but the significant change work would also risk diverting resources away from core museum service development and delivery

Museum closure

Future options could also consider museum closure. A brief summary of the steps that would need to be taken and the impact is below.

Steps to close the museum

- The Museums Association has a [guidance document](#) on the legal and ethical considerations for museum facing closure, this should be followed.
- Public consultation on the impact of closure is a legal duty under the Equality Act (2010)
- Stakeholder and partner consultation is essential to ensure that public benefit is maintained wherever possible.
- A plan for closure should consider
 - museum visitors and local communities
 - staff and volunteers
 - collections
 - buildings
 - external funding relationships and
 - partnerships
 - other physical and digital assets.
- The future of the museum collection will be a key concern for the public and stakeholders. The governing body could consider continuing to own and manage the collection (with associated costs and responsibilities) or disposal in line with the [Museums Association's Off the Shelf toolkit](#) for ethical transfer, reuse and disposal of collections.

Possible impacts to consider

- Loss of public trust (and reputation) in the authority's ability to care for and promote the history and heritage of Epsom and Ewell.
- Loss of trust with key stakeholder (especially volunteer) groups
- Limited financial savings- the costs of closure would be considerable. If the collection is not disposed of there will be ongoing storage and management costs. If it was disposed of this would require prolonged staff time (and expertise) to be completed legally and ethically.
- If the collection is maintained as a resource with no fixed public offer there would still be ongoing costs to manage and care for it appropriately and ethically. As the museum currently employs 1.5 FTE there is limited room to reduce this cost.
- A collection without a physical museum offer is not eligible for the Accreditation Scheme which would, in turn, restrict the funding opportunities available to it.