

Museum Service Business Case

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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.			requirements during mobilisation.
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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.