

Visitor Studies Group Business Plan Commission

Dear VSG members

As you know, at the last AGM we agreed to work on a three-year business plan for the VSG, following consultation with members. The Committee has been working hard with Frances Medley to achieve this. In order to ensure the future of the group and its development we have identified some possible changes to the way the group is run and we would like your views. Indeed, there are some aspects that require ratification at the AGM and we are inviting members to feedback on these proposals now before voting at the AGM.

These changes may not appear to be particularly dramatic but we feel they offer the VSG much greater clarity in its work, greater agility in its operations and greater opportunities to increase membership for a more sustainable group.

Frances has detailed the thinking behind the changes in the report below. The main points can be summarised as follows:

Requires ratification by VSG Members at the AGM

- Rewrite our mission statement and objectives - see proposals in the report.
- Change individual and institutional membership of the group - see options in the report.
- Reduce the Committee size from 8 Members plus 4 co-opted Helpers, to 6 Members and up to 4 co-opted Helpers.
- Structure the Committee membership to ensure greater succession and continuity.

We would like your views on the following:

- Focus our work around three themes: Practitioners, Visitors and Leaders.
- The activities of the group will actively enable skills-sharing between VSG members.
- Widen the remit of the paid administrative support the group needs. We propose advertising a freelance opportunity to deliver the tasks outlined in section 3 of the progress report attached.

We would value your thoughts on the ideas presented in the document below. How you can respond:

1. Complete the short, anonymous survey - your responses will go straight to Fran
2. Contact Helen directly by email, or phone for a chat
3. Share your views on the VSG list serve.

We very much want to hear your views on the group as we move into the future and we look forward to hearing from you. Please send your comments to us by 30 November 2011.

Best wishes

Helen

Chair, on behalf of the current VSG Committee

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Progress Report for Visitor Studies Group Members

1. Work to Date

In April 2011 Frances Medley (FM Consultancy) was commissioned to develop a business plan for the Visitor Studies Group (VSG). A programme of work was agreed with the Chair and Vice Chair of the VSG, based on a process of developing a business plan with the VSG Committee, rather than simply writing one on the VSG's behalf. The work to date has focussed on reflecting on the first 13 years of the VSG, building on the review undertaken in 2009/10 and placing the VSG in its 2011 context.

Visitor Studies - A Philosophy: The programme of work has involved a fundamental revisiting of the values and motivation underpinning the VSG i.e. why does it exist and what is it seeking to do. The outcome of the process has already resulted in a greater clarity of what the VSG is all about; specifically that Visitor Studies is a philosophy rather than a discrete discipline.

Visitor Studies is fundamentally about improving the experience of the visitor and this underlying philosophy permeates all aspects of an organisation's work. Visitor Studies is a cross cutting theme that impacts, or should impact, across the organisation/institution.

Visitor Studies (VS): VS is a relatively young practice, in the context of other formal disciplines, in the organisational/institutional settings within which most practitioners are employed. For most of the last 150 years, visitors respectfully accepted the received wisdom of curators who were the custodians of cultural and heritage collections. More recently the relationship between the visitor and the visited has changed with the needs of the visitor taking ever more prominence. The organisation/institution needs to establish more engaging relationships with its visitors in order for it to be better placed to meet the needs of visitors, and to ensure the long-term support of the public for the work of the organisation/institution.

Since the VSG was established VS has become more mainstream although the need to reinforce the value of VS is perhaps even more important in 2011 as financial pressures face most organisations/institutions. Reflecting on the last 13 years the VSG Committee considered what Visitor Studies is with practitioners working in a variety of departments from education, to fundraising, to marketing and others.

The common theme running through all of the definitions is that the VSG supports work within informal, or free-choice, learning environments. Informal, differentiating the work from formal curriculum based settings, although some of the work contributes towards curriculum based learning.

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The terminology used by the VSG needs to be one that all members can place themselves within.

Three Themes to the VSG's Work: The VSG Committee reconsidered who the VSG is for, who the target groups are that the work is aimed at and who potential members are. The conclusion is that there are three themes:

- **Practitioners:** the community of people working in Visitor Studies
- **Visitors:** potential beneficiaries of the work of the VSG and its members
- **Leaders:** the people in leadership positions in organisations/institutions and those that influence them

All of the future work of the VSG will be focussed on one of these three themes.

The Underpinning Values: the central value of the VSG is one of sharing skills and insight. The VSG represents best practice in VS, is welcoming and provides excellent opportunities for continuing professional development.

The work undertaken to date falls into two categories:

- Constitutional Changes
- Proposals for the Future

The following sections outline the proposals under each category and how members can express their views.

2. Constitutional Changes

The VSG Committee has reviewed the Mission Statement, the Objectives, the Committee Structure and the Membership Scheme. The following proposed changes amend the constitution and will need members to **vote** on them. The proposed changes are those in the shaded boxes and it is these changes that members are will be asked to **vote** on in January 2012.

Mission Statement and Objectives

Our existing Mission Statement and Objectives can be found on our website at: <http://www.visitors.org.uk/node/8> . For ease of reference the current mission, aims and purposes are in the tables below.

Current Mission
The mission of the Visitor Studies Group shall be: <i>To share, develop and promote understanding of the visitor experience in natural and cultural heritage settings</i>

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The proposed new Mission Statement and strap line are:

The Visitor Studies Group - Championing excellent visitor experiences

The VSG is a dedicated community of VS professionals. We promote dialogue, facilitate debate and through skills-sharing opportunities provide continuing professional development.

Current Aims and Purposes

The Visitor Studies Group seeks to be

- 3.1 a network of those concerned with visitor studies in natural and cultural heritage settings
- 3.2 a source of information about study methodology and results
- 3.3 a body encouraging training and good practice in visitor studies
- 3.4 an authoritative voice on the benefits of visitor studies
- 3.5 a promoter of visitor advocacy
- 3.6 a facilitator of working partnerships in visitor studies
- 3.7 a partner with other specialist groups to achieve common aims in order to help those involved in running natural and cultural heritage attractions to apply visitor studies to increase the visitor's enjoyment of their physical, educational, intellectual and emotional access to the heritage of museums, galleries, buildings and sites.

The proposed new Objectives are:

The Visitor Studies Group will:

- Actively promote and provide an annual programme of high quality training, development and skills-sharing opportunities
- Provide a website with information and resources to support best practice in Visitor Studies including practical case studies, methodology and research
- Present opportunities to debate current issues in Visitor Studies.
- Offer members opportunities to influence the Visitor Studies community through Committee membership.
- Facilitate the exchange of ideas between the many disciplines where Visitor Studies practitioners operate.

The work of the VSG will be underpinned by an ethos of sharing skills, partnership and actively seeking out opportunities to contribute to the development of the Visitor Studies profession.

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Committee Structure

The current constitutional arrangements require Committee Members to be elected each year although in practice members have served three years, i.e. to the end of the maximum term of office. The proposal seeks to provide a greater degree of continuity. The VSG Committee considered various options to address succession planning and proposes that members are elected for a three-year term, with no need to renew annually. The succession plan would be phased in towards a situation where a third of the members were new each year. Helpers would commit to being in post for one year only, with an option to stand again if they wish.

The current constitution and Committee structure can be found at <http://www.visitors.org.uk/node/8>. For ease of reference the current Committee Structure is in the table below.

7. Committee

The Committee of the Visitor Studies Group will comprise

7.1 the officers, namely, a Chair, Deputy Chair, Membership Secretary and Treasurer and four other elected members;

7.2 the four other elected members should be prepared to undertake specific responsibilities for running aspects of the Visitor Studies Group operations as agreed by the Committee from time to time;

7.3 The Committee shall be elected at the AGM to serve for one year.

7.4 The Committee shall have power to co-opt up to four non-voting helpers;

7.5 a) Individuals can serve on the committee as members for a maximum term

of three years. Former committee members can stand for a further three year term election after a break of at least one year. Committee members are elected by the VSG membership. Proactively seeking new committee members to join by the existing committee is encouraged.

7.5 b) Individuals can serve on the committee as helpers for a maximum term of three years. Former helpers can commit to a further three year term as helpers after a break of at least one year. However, during their first term as a helper they can stand for election

as a full committee member at any time without a necessary break. Helpers are elected by the VSG Committee. Proactively seeking new committee helpers to join by the existing committee is encouraged.

7.6 No person shall be a Committee member who is not a member of the Group. Any Committee member ceasing to be a member of the Group shall at the same time cease to be a Committee member;

7.7 The Committee shall meet at least three times per year.

It is proposed that the VSG Committee will have 6 members and 4 helpers with the capacity to co-opt additional members for specific tasks from time to time. The Committee is keen to ensure that the Committee members are drawn from across the UK reflecting the range of needs of the VSG members. The roles of the revised Committee would look like this:

- 6 Committee Members: Chair, Vice Chair plus 4 Ordinary Members
- Of the Ordinary Members: 1 lead on the Visitor, 1 lead on the Leader, 1 lead on the Practitioner and 1 on Marketing / Membership
- 4 Helpers shadowing the 4 ordinary members' portfolios. So if 2012 has a Leader focused event then the helper would help with this event; if the Visitor focus is web content they would help with this etc.

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In support of the proposed changes the membership is asked to consider the extension of the term of office of the current Chair and Vice Chair. In parallel a new chair and vice chair would be identified from the Committee to shadow the outgoing Chair and Vice Chair. The proposal is put forward as the current incumbents have already served three years on the Committee. This proposal would be a one off and provide continuity as the new operational arrangements are introduced.

It is proposed:

The current Chair and Vice Chair have their terms of office extended for one year i.e. 2012/2013. This amendment is for one year and will not set a precedent.

Membership Scheme: we are proposing two changes:

1. Reviewing the membership fee and length of Individual membership. The fees would be set for the three years of the Plan with a structure allowing people attending an event to join the VSG for a year when they attend their first event. The option to become a member for three years is also proposed (possibly for a discounted rate). Your comments on this would be welcome. The changes will be implemented with effect from 1 January 2012.
2. Reviewing the Institutional membership. This will require ratification at the AGM and your responses will be incorporated into the overall Plan. Any changes would not come into effect until 2013.

Before 2008 the VSG had Group membership where all members within a Group had individual membership numbers and therefore voting rights. Groups were: Small up to 4, Large over 5, and fees were £50 and £90 respectively.

In 2008 it was agreed to revise this and create Institutional membership. Here there is one subscribed member plus any number of non-voting (named) members who receive access to the website and members' rate for events etc. The fee has been unchanged since 2008 at £100.

The VSG believes the Institutional membership rate does not reflect the diversity of the institutions that are members, and so perhaps unfairly discriminates against smaller institutions. Your comments on the current institutional membership would be welcome.

3. Proposals for the Future

This section outlines the proposed changes to the way the work of the VSG is planned and managed. Support mechanisms designed to work alongside the formal approach to planning are also proposed. Members are invited to comment on the proposals outlined in section 3. Comments received by 30 November 2011 will be incorporated into the final plan.

A Formal Approach to Planning

The formal approach to planning will focus around the three themes of: the Practitioner, the Visitor and the Leader.

A three-year plan will be structured around three types of activity:

- training/development
- debate/dialogue
- the website.

Each year we aim to hold three activities:

1. A two-day event offering the opportunity to discuss and debate key issues in the sector with an inspirational speaker, alongside sharing skills and networking opportunities. The AGM will be incorporated into this two-day event.
2. Two other activities. These could be regional seminars, synthesis reports, or training opportunities. We are doing this in response to feedback from our Members, so that the VSG can run effective and sustainable activities, and so that opportunities exist for members with a range of interests to contribute to the activities of the VSG.

All of the work of the VSG will be supported by website content that reflects the three themes. (An illustration of the proposed framework for the programme is below).

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A Tabular Representation of the Proposal for Activity Planning				
Focus	Category of Activity	Year 1	Year 2	Year 3
The Practitioner	Training /Development	Event		Event
	Debate/ Dialogue/AGM	Speaker addresses AGM		
	Website	Case Studies /resources	Case Studies /resources	Case Studies /resources
The Visitor	Training /Development	Event	Event	
	Debate/ Dialogue/AGM		Speaker addresses AGM	
	Website	Case Studies /resources	Case studies /resources	Case Studies /resources
The Leader	Training/ Development		Event	Event
	Debate/ Dialogue/AGM			Speaker addresses AGM
	Website	Case Studies /resources	Case Studies /resources	Case Studies /resources

Support Mechanisms

The VSG Committee and Membership offer a vast range of skills and expertise which will be harnessed as part of the ethos of skills-sharing. To support the work of the Committee the following support mechanisms are proposed and will be funded from membership fees and event income.

It is proposed that the VSG will revise the current administrative support to include: administering the Committee and the Membership Scheme; organising and promoting events; keeping the website up to date with relevant content, developing and delivering a marketing strategy. This will be offered as a freelance contract.

It is proposed that in addition to the Alison James Bursary, the VSG will offer a bursary scheme to support members wishing to attend other non-VSG events, in their specialist field. Bursary recipients will attend the event representing VSG and their own/host institution. In return for the bursary the recipient will produce a report for the website reflecting their learning relating to VS.

In the spirit of skills-sharing the VSG Committee wants to encourage the active involvement of the VSG Members specifically using the vast body of experience to both support CPD and lead the debate about the future of VS. The VSG comprises a community of professionals working in a range of informal learning environments united in a commitment to excellence in the visitor experience.

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5. Financial position

One of the drivers for undertaking this review was to identify how the VSG could survive financially whilst meeting the needs of our members. There are certain assumptions which we have based our proposals on e.g. increased number of members, small increase in membership fees, event fees etc. These are outlined in the table below.

The VSG has two income streams: membership fees and profit from events. Until now, we have run our events to break-even so our sole income has been from membership fees. We are proposing to change this so that our income comes approximately equally from both streams. This will allow us widen the scope of the administrative support and ease the administrative burden of the voluntary Committee to raise the profile of the VSG with existing and potential members.

Membership		2012	2013	2014
	Number of full price	80	90	100
	Number of concessions	20	25	30
	Number of institutional	10	8	8
	Membership fee (full price)	£30	£35	£40
	Membership fee (conc)	£15	£18	£20
	Membership fee (insti) ¹	£125	£150	£200
Activities				
	Two day - number in attendance (concessions)	65 (5)	70 (5)	75 (7)
		£150	£160	£170
	Two day - delegate fee (concession)	(£100)	(£100)	(£100)
	One-day skill sharing - number in attendance	18 (2)	22 (3)	22 (3)
	One-day skills sharing - delegate fee (concession)	£45 (£30)	£50 (€30)	£55 (€30)
Administration		£	£	£
	Administration for the group	5000	5250	5500
	Administration consumables	500	600	700
	Committee meeting expenses* ² (travel)	1600	1800	2000
	Annual Alison James Professional Development bursary	500	500	500
	Conference bursary (per bursary) ³	100	125	150
	Web support	500	600	650

¹ A more fundamental review of our institutional membership is currently being considered and we will be asking members to vote on proposals before the next AGM.

² Committee meeting expenses are based on there being four meetings a year, allowance is £40 (2012), £45 (2013), £50 (2014), six Committee members and four helpers attending. To date, it is rare for all Committee members and helpers to claim their travel expenses however we have to budget for this eventuality. We will continue to support travel expenses for Committee members to ensure that we provide equality of opportunity and to actively encourage freelance members and students to become Committee members.

³ This is a new initiative; see section 3 for further information. We are proposing to have five bursaries at £100 (2012), £125 (2013) and £150 (2014).

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5. How can VSG Members contribute?

How to send your comments on the Constitutional Changes and the proposals for future working:

Use the online survey to send your comments directly to Fran.

If you prefer you can send your comments:

- by email or phone to Helen Featherstone
- or use the VSG List Serve to discuss with other members.

Following consideration of your responses, we will set up an on-line voting system just before the AGM, so that you can vote on the final plans, and the constitutional changes can then be ratified at the AGM.

Thank you for your time and your thoughts. We look forward to hearing from you by **30 November**.

Frances Medley (Consultant) and Helen Featherstone (Chair)