

ROCHDALE

Renewing Our Co-operative Heritage, Developing the Archive and Learning Experiences

Outline Business Plan

The Rochdale Pioneers



Thirteen of the original
Rochdale Pioneers.



The original store of the Rochdale Pioneers, number
31 Toad Lane, and Rochdale Pioneers Museum.



The impressive new central premises
on Toad Lane opened by the
Pioneers in 1867.



Branch number 13,
the Pioneers Society grew to have
many branches all over Rochdale.

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“A unique insight into the lives and desires of ordinary people.”

David Boston, Headteacher, Sir Thomas Boughey Business & Enterprise School

‘Our visit to the museum and the experience of the archive have inspired us on our journey as a students of co-operation. They have helped my co-operative to interpret its co-operative identity in the modern world’

Trent Bartlett, Chief Executive, Capricorn Co-operative, Australia



“The archives are outstanding in importance for the Global co-operative movement.”

Iain McDonald, Director General, ICA

“They are among the two or three richest sets of resources on the co-operative movement to be found anywhere in the world.”

Ian MacPherson, British Columbia Institute for Co-operative Studies

“A resource of truly international significance.”

Fellow, Institute of Education, London



1. Executive Summary

1.1. Project Aims

The ROCHDALE project will enable the Co-operative Heritage Trust to move from safeguarding and preserving co-operative heritage to using it to inspire a wider public about the extraordinary history and development of the worldwide co-operative movement, its heritage and contemporary relevance. This will transform the collections in the following ways:

- **Preservation:** supporting activity to professional standards and ensuring the long-term care of this North West created, global Heritage.
- **Access:** increasing the audience for its collections and overcoming cultural, physical and other obstacles; involving community groups and individuals in understanding their co-operative heritage; enabling people who are unable to visit to engage and become involved by accessing digitisation programmes.
- **Education:** developing the collections as learning resources; renewing interpretive displays; developing educational materials; building links with the education sector from schools to higher education and beyond into the wider community.
- **Capacity:** providing bridge funding for education and outreach staff, ensuring the Museum and Archive have appropriate staffing, volunteers and resources.

1.2. Key Activity Areas

In order to achieve the aims stated above there are 5 key activity areas:

- Refurbishing the Rochdale Pioneers Museum.
- Improving access to Archive and Museum collections.
- Developing new and existing audiences.
- Expanding educational initiatives for students and lifelong learners.
- Building capacity through increased staffing.

By addressing each of these areas through the project we will transform the museum and archive into resources that will *inspire people within and beyond the co-operative movement about the origins, development and contemporary relevance of co-operation by collecting, safeguarding and making accessible artefacts and documentation through lifelong learning and research. (Co-operative Heritage Trust mission statement).*

1.3. Financial Summary

The overall cost of the project is £2,320,275. The table below shows how these costs breakdown by activity;

| | £ | VAT | £ inc VAT |
|-------------------------------|------------------|----------------|------------------|
| Rochdale Pioneers Museum | 1,210,412 | 211,192 | 1,421,604 |
| National Co-operative Archive | 52,963 | 9,269 | 62,232 |
| Education | 177,035 | 30,981 | 208,016 |
| Staffing | 346,994 | 438 | 347,431 |
| Other | 254,050 | 26,941 | 280,991 |
| Total | 2,041,454 | 278,821 | 2,320,275 |

Of this 73.6% is requested from the Heritage Lottery Fund, with the Co-operative College providing 16.8% and other sources of funding being sought to fund the remaining 9.6%. Of this 74.2% will be allocated to conserving and enhancing the heritage, 17.1% to encourage more people to be involved with the heritage and 8.7% to enjoying, accessing and learning about their heritage.

2. The Rochdale Pioneers Museum and the National Co-operative Archive

2.1. History

2.1.1. Rochdale Pioneers Museum

The Rochdale Pioneers Museum is housed in the building where the Rochdale Equitable Pioneers Society started trading on 21 December 1844. The Rochdale Pioneers were a group of working people who realised that they could improve their living conditions by working together and through self help. Their efforts marked the development of a sustainable model of co-operation that inspired groups of people in the North West and throughout the UK to get together to form their own co-operative societies. They effectively founded a movement that now involves, as member owners, over eight hundred and sixty million people across the globe and employing over 120 million workers. It that has helped, and continues to help lift and keep people out of poverty and has been stated by the United Nations as improving the lives of over half of humanity.

The Rochdale Pioneers' experiments in wholesaling and encouraging co-operation amongst co-operatives led to their involvement in the formation of the Co-operative Wholesale Society in 1863 (now the Co-operative Group) and the Co-operative Insurance Society in 1867. Their experience of providing inspiration and advice led to the formation of the national federation of co-operatives, the Co-operative Union (now called Co-operatives^{UK}) in 1869. These national organisations all have their headquarters in Manchester reflecting their origins in the North West.

By the beginning of the 1860s, the Rochdale Equitable Pioneers Society was being visited by individuals and groups from across the world to find out about how the Society started and grew, leading to the development of co-operatives drawing on the Rochdale experience in many parts of Europe and the newer continents and laying the foundations for the subsequent establishment of the International Co-operative Alliance in 1895.

The success of the Rochdale Pioneers meant that they quickly outgrew their rented space at 31 Toad Lane, but it remained a source of inspiration for many. As a result the Co-operative Union purchased the building at 31 Toad Lane in 1925 expressly to create a museum, which opened in 1931.

In the 1970s, structural problems were found with the building and the Museum was closed for four years to allow a concrete shell to be constructed inside the building to support the walls and to remove the second floor as it was not regularly used at that time.

The Museum reopened in 1981 with regular opening hours and a Warden to give a guided tour to visitors. Rochdale Council redeveloped the remaining section of Toad Lane outside the building, which has been a cul-de-sac since extensive new road development in the 1960s, and created the Toad Lane Conservation Area.

The management of the Museum was transferred to the Co-operative College at the beginning of 2000, and it became recognised as a registered museum in 2001.

2.1.2. National Co-operative Archive

The origins of the Archive date from 1903 when the Robert Owen Correspondence Collection was transferred to the Co-operative Union. The collections have built up gradually over a period of just over a century.

From 1946 when the Co-operative College moved away from Manchester, two archives developed. By the late 1990s, it was recognised that this was not an ideal situation and the decision was taken to merge the two archives to give researchers access to a dedicated centre and to form the National Co-operative Archive at the Co-operative College.

Following the creation of the National Co-operative Archive, major collections were deposited by other co-operative organisations, enhancing the collections and the potential for researchers.

As the collections have been brought together, duplicates of secondary material such as journals have been identified and transferred wherever possible to other archives to enhance their collections.

In 2001 the Co-operative College relocated to its original home in Manchester, enabling the subsequent development of the Archive and Museum. The National Co-operative Archive received designated collections status in 2007.

2.2. The Archive Collections

Collections include the original records of national co-operative organisations and of societies that now form part of the Midlands Co-operative Society and the South East, South Midlands and Northern regions of Co-operative Group, along with photographic and film archives.

The Archive's special collections include.

- Robert Owen
- George Jacob Holyoake
- Edward Owen Greening
- Rochdale Pioneers
- Co-operative College

- Co-operative Society Histories
- Women's Guild
- Young Co-operators
- Christian Socialists
- Films
- Production
- Co-operative Congress
- Periodicals
- Plays
- Statistics

2.3. Operations

The Rochdale Pioneers museum is located at 31 Toad Lane, Rochdale, the original store of the Rochdale Pioneers. The museum provides an insight into the co-operative movement from its roots in Rochdale.

The museum is open from Tuesday to Saturday, 10am to 4pm. Sunday 2pm to 4pm. Admission is £1 for adults with senior citizens, children and students being £0.50. Family tickets are available at £2 each.

The National Co-operative Archive is housed in Holyoake House, Hanover Street, Manchester.

The Archive is open Monday to Friday 10am to 5pm with the exception of Bank Holidays. The Archive is closed between Christmas and New Year.

3. Co-operative Heritage Trust

The Co-operative Heritage Trust was established in 2007 by Co-operatives^{UK}, the Co-operative Group and the Co-operative College. It is a registered charity (number 1121610).

Co-operatives^{UK}, the Co-operative College and the Co-operative Group are the founders of the Trust and have assigned their archive collections and in the case of Co-operatives^{UK}, the Toad Lane premises to the Trust. The Trust is arranging similar assignments of collections from other bodies who have donated collections in the past including the Co-operative Press, the National Association of Co-operative Officials, the Midlands Co-operative Society and the Co-operative Party. The Co-operative Heritage Trust now owns the building and principal collections and is the governing body for the Archive and Museum.

3.1. Charitable Objects

The charitable objectives of the Co-operative Heritage Trust are:

- The preservation, protection and improvement for the public benefit on behalf of the co-operative movement of 31 Toad Lane, Rochdale (known as the Rochdale Pioneers Museum) and any ancillary buildings as shall or may at any time be vested in the charity or in respect of which the charity shall have any interest.
- The preservation, protection and improvement for the public benefit on behalf of the co-operative movement of all furniture, pictures, historical records, books, manuscripts, films, photographs, objet d'art and other chattels or items of historic interest associated with the co-operative movement that form the national co-operative archive and the collections of the Rochdale Pioneers Museum or that may, at any time, be vested in the charity or in respect of which the charity shall have any interest.
- The encouragement of the provision of access to and the study of such buildings, land, furniture, pictures, historical records, books, manuscripts and other chattels or items that comprise the National Co-operative Archive and the Rochdale Pioneers Museum by members of the general public
- Such other charitable objects as the trustees from time to time determine subject to the prior consent of the founder and the charity commission.

3.2. Mission & objectives

The mission statement of the Co-operative Heritage Trust is:

'To inspire people within and beyond the co-operative movement about the origins, development and contemporary relevance of co-operation by collecting, safeguarding and making accessible artefacts and documentation through lifelong learning and research.'

Following on from this the objectives are;

- To develop the Museum and Archive collections as lifelong learning resources.
- To ensure that the documentary and material evidence for the story of the movement is preserved and made available for present and future users.
- To take a lead role in developing and maintaining a partnership of archive repositories and other custodial institutions which have records or artefacts relating to the co-operative movement in order to establish a network of information and resources on the history of the movement.
- To enable the material to be used to inform the content of appropriate learning programmes.
- To make the collections of the Museum and Archive widely accessible through full cataloguing, proper storage and retrieval facilities and digitisation of appropriate elements.

3.3. Governance

The Co-operative Heritage Trust is governed by a board of Trustees. The day to day management of the Archive & Museum is undertaken by the Co-operative College under a Management Agreement.

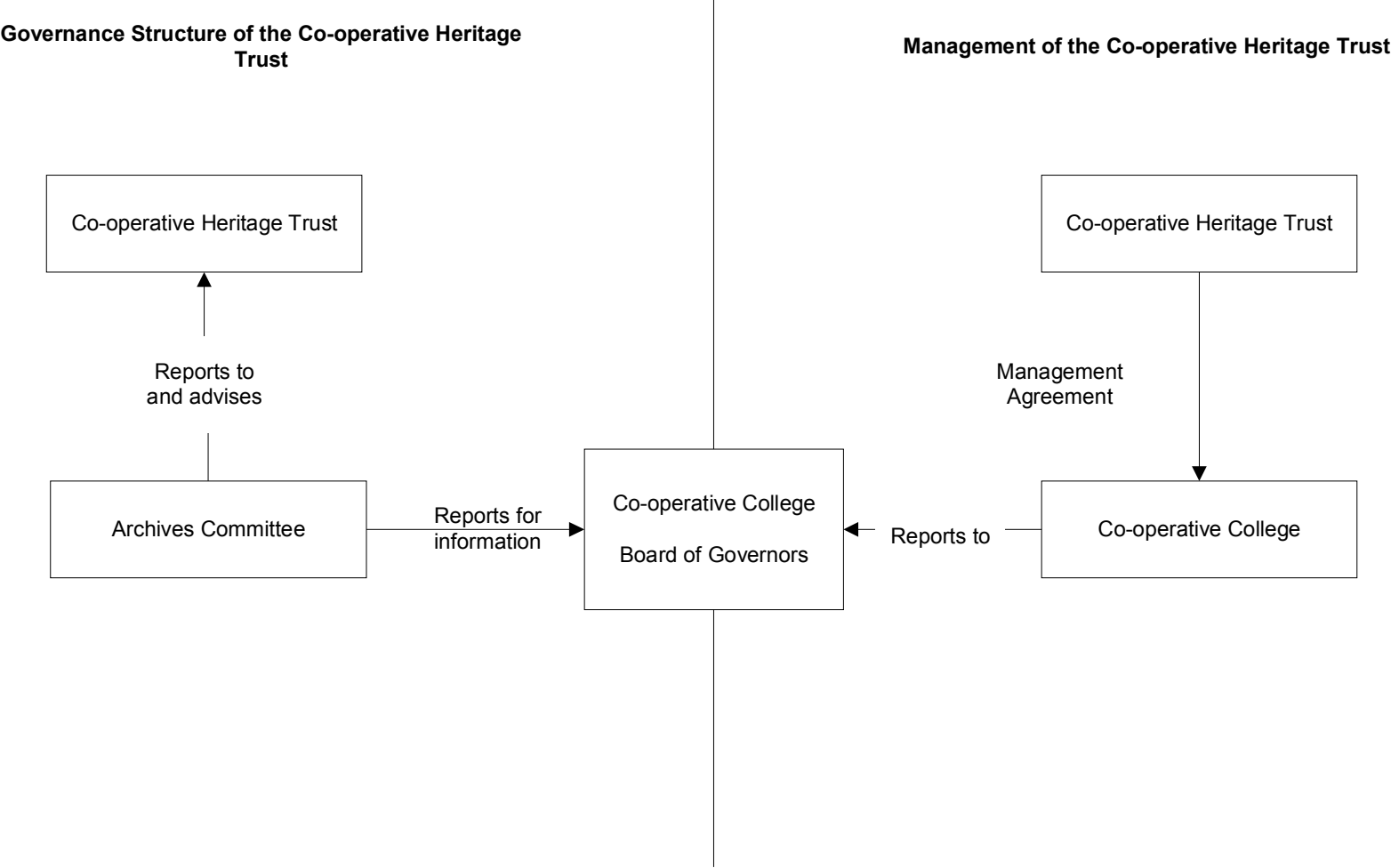
3.3.1. Board of Trustees

The Memorandum and Article of Association state that the trustees can number up to 6. There are currently 6 trustees:

Mervyn Wilson
Professor Stephen Yeo (Chair)
Dame Pauline Green
Professor Ian Snaith
Karen Froggatt
Robin Stewart

The trustees were appointed from the Trust founders Co-operatives^{UK}, the Co-operative Group and the Co-operative College.

3.3.2. Governance and Management Structure of the Co-operative Heritage Trust



The Co-operative College manages the Rochdale Pioneers Museum and the National Co-operative Archive on behalf of the Co-operative Heritage Trust. The College is accredited as an Investor in People and holds ISO 9001 in recognition of the quality standards and procedures that it has developed.

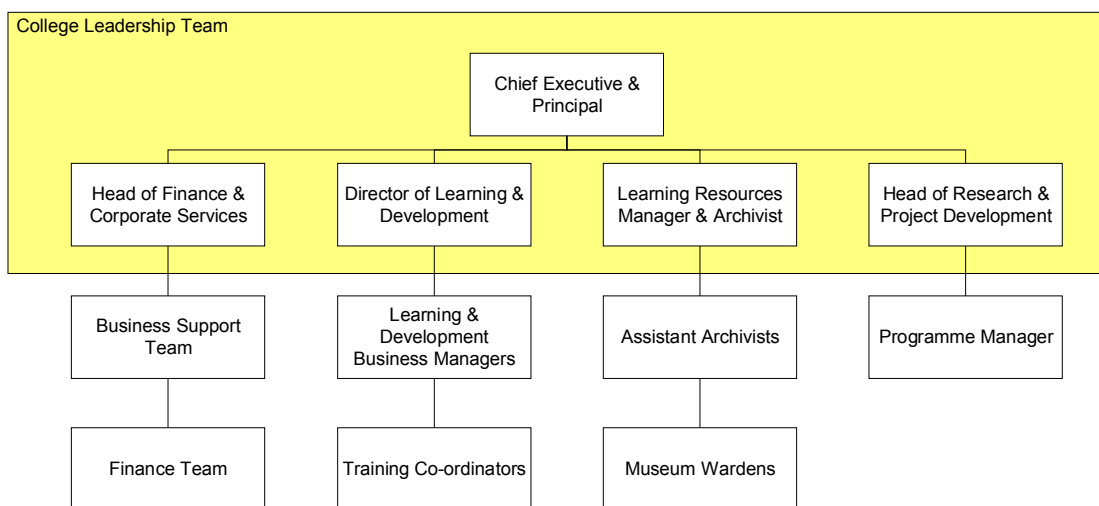
The Archive Committee was originally established as a committee reporting to the College Board. With the establishment of the Co-operative Heritage Trust it now reports to and advises the Heritage Trust with copies of minutes going to the College Board for information.

The membership of the Archive Committee is shown below;

- Professor Stephen Yeo (Chair)
- Nick Mansfield (Curatorial Advisor)
- Joan Allen (University of Northumberland)
- Frank Dent
- Professor John Feather (Loughborough University)
- Karen Froggatt (The Co-operative Group)
- Gillian Lonergan
- Sue Letts (Midlands Co-operative Society)
- John Walton (Leeds Metropolitan University)

3.4. Organisational Structure

The diagram below shows the top line structure of the Co-operative College, to whom the day to day management is contracted.



3.5. Management Team

The Co-operative College Leadership Team consist of five members of which the Learning Resources Manager and Archivist is a member.

3.6. Staff

The Co-operative College currently employs 26 staff on a full and part time basis. Of these 3 work at the Rochdale Pioneers Museum as wardens and

3 work in the National Co-operative Archive. The organisation chart in Section 3.8 shows the structure of these positions.

The number of staff anticipated to be employed as a result of this project is 4 The College also expects that its own staffing levels will increase during 2008 to 33.

3.7. Volunteers

The College regularly reviews its policies and procedures to involve and support volunteers engaged with the Archive and Museum. It is working towards the Investors in Volunteers standard.

3.7.1. National Co-operative Archive

Volunteers and placement students work with staff, gaining hands-on experience in archival methods and practices. Wherever possible, projects are tailored to the volunteer's particular area of interest. Placements are available throughout the year, by arrangement.

3.7.2. Rochdale Pioneers Museum

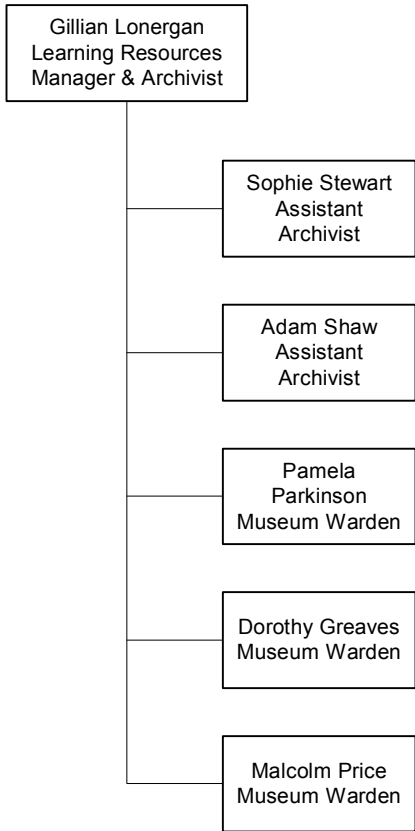
The Friends of the Rochdale Pioneers Museum are a group of people who, as well as being interested in co-operation, enjoy meeting people. They help at the museum on a Saturdays, talking to visitors about the history of the co-operative movement and sharing experiences of co-operation.

When new Friends join, they are invited along to a 'familiarisation day', when they get to know the Museum and its story - though any Friend will cheerfully report that the learning never stops.

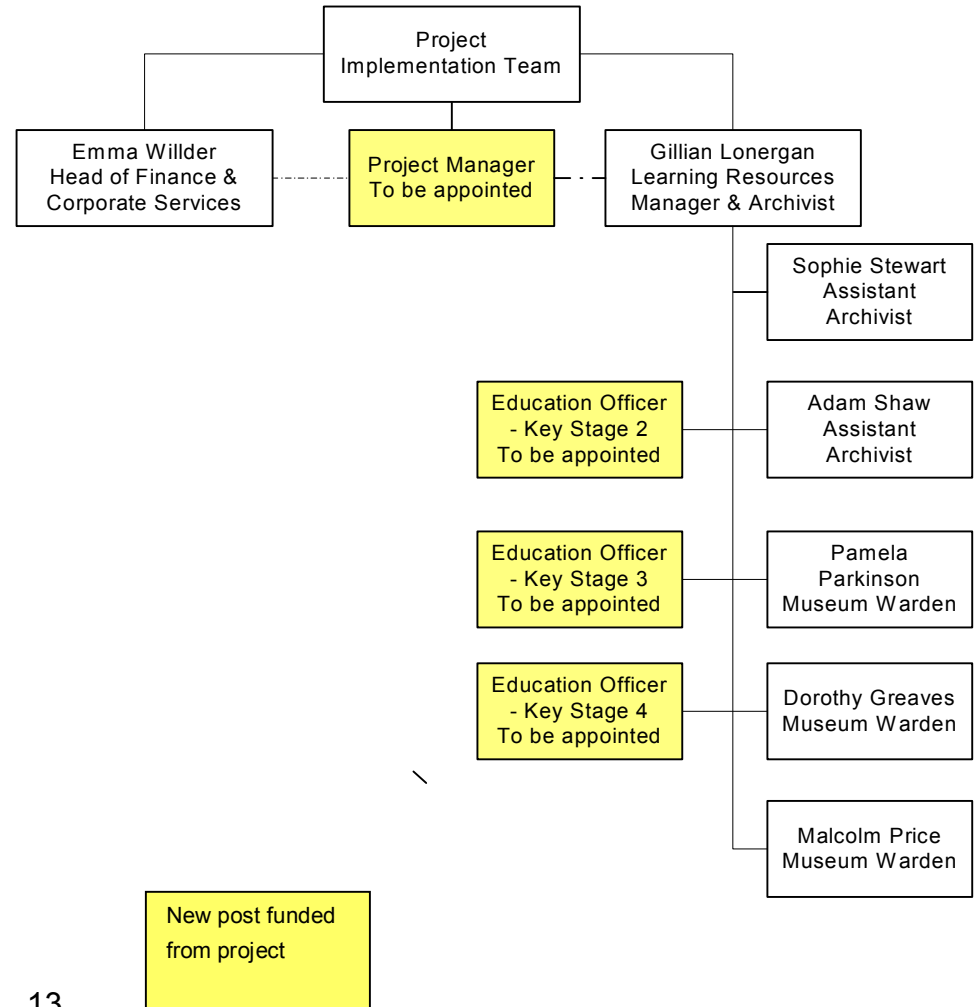
The Friends meet at least twice a year at the Museum. They also have an annual day trip, either to visit another Museum or a site of co-operative interest.

3.8. Staffing Structure for National Co-operative Archive & Rochdale Pioneers Museum

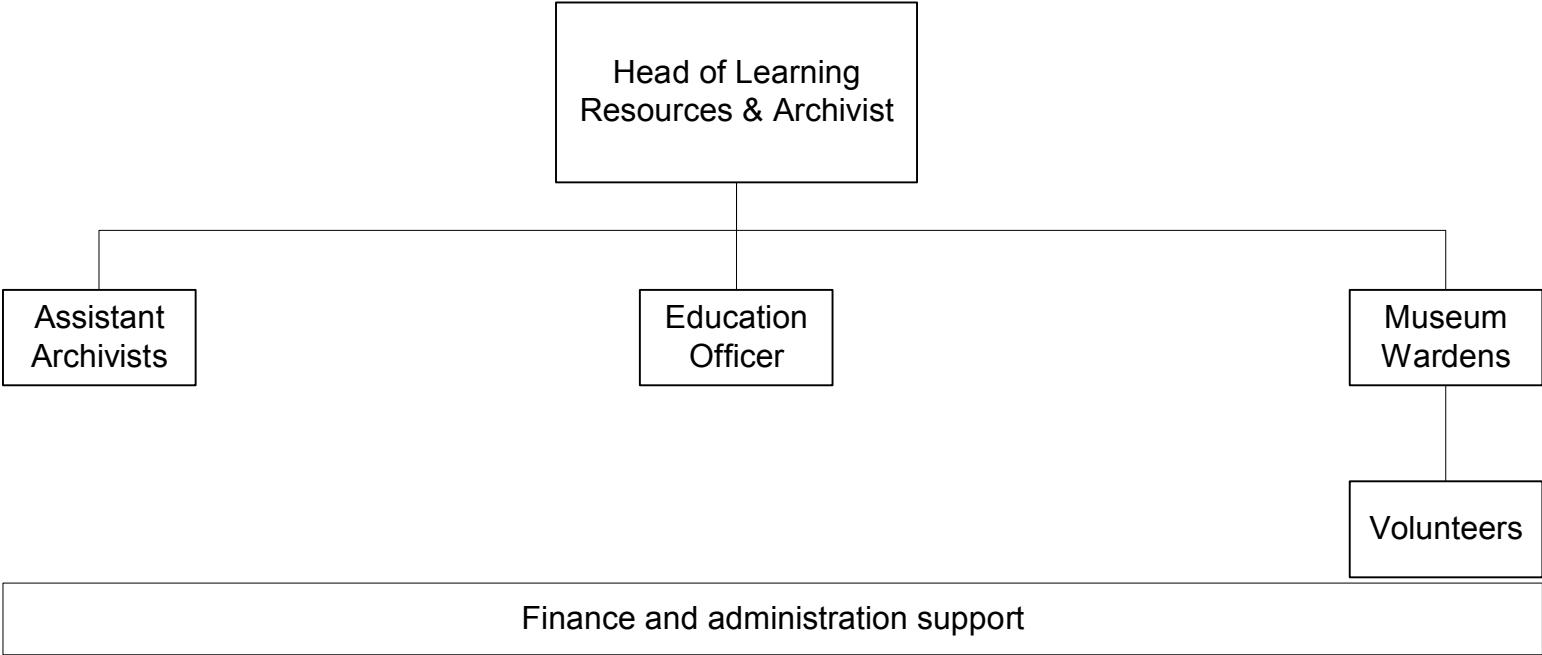
Current



During Project



After project completion



3.9. Organisational Experience

3.9.1. Co-operative College

| Project Title | Location | Total value of project | Lead Manager / Partner | Funder | Dates | |
|---|-------------|------------------------|------------------------|--|--------|---------|
| | | | | | From | To |
| Nuffield | East Africa | £50,000 | Lead, no partners | The Nuffield Foundation | Jan 07 | Dec 07 |
| COCADE (Co-operative Curriculum for Adult Education in Europe) | Europe | €364,646 | Lead with 4 partners | EU: Socrates Funding line | Oct 04 | Sept 07 |
| Building capacity to support smallholder farmers through co-operative education in Ethiopia | Ethiopia | £97,085 | Partner | British Council | Jun 07 | May 08 |
| Food & Development: Education for the concerned consumer | UK | £258,250 | Lead, no partners | Department for International Development: Development Awareness Fund | Apr 07 | Mar 10 |
| Young Co-operatives | UK | £67,939 | Lead, no partners | Department for International Development: Development Awareness Fund | Jul 07 | Mar 09 |
| Development of the National Co-operative Archive and the Rochdale Pioneers Museum | UK | £64,293 | Lead, no partners | Heritage Lottery Fund | Apr 05 | Mar 08 |
| Specialist Schools Trust | UK | £319,000 | Lead, no partners | The Co-operative Fund (formerly known as | Oct 04 | Sept 07 |

| Project Title | Location | Total value of project | Lead Manager / Partner | Funder | Dates | |
|---|-------------|------------------------|------------------------|---|--------|---------|
| | | | | | From | To |
| | | | | Co-operative Action) | | |
| Strategic Grant Agreement | UK | £381,677 | Lead, no partners | Department for International Development | Oct 04 | Mar 07 |
| Women in Management | UK | £128,960 | Lead, no partners | European Social Fund | Jan 06 | Jun 07 |
| A Woman's Place | UK | £14,675 | Lead, 2 partners | Museum Libraries and Archives Council: Their Past Your Future phase 2 | Jan 08 | Dec 08 |
| Co-operative Group Archive | UK | £39,100 | Lead | The Co-operative Group | Apr 07 | Mar 08 |
| MOSE: Models of Social Enterprise in Europe | Europe | €541,038 | Partner | EU: Leonardo da Vinci funding line | Mar 07 | Feb 09 |
| COSRAFT: Co-operation, Social Responsibility and Fair Trade | Europe | €86,028 | Lead, 3 partners | EC Industrial Relations and Social Dialogue: | Nov 04 | Jul 05 |
| UCE: | Europe | €420,337 | Partner | EU: Leonardo da Vinci funding line | Oct 05 | Sep 07 |
| Schools Curriculum | UK | £169,629 | Lead | The Co-operative Fund (formerly known as Co-operative Action) | Oct 07 | Sept 08 |
| New Directions in Schools Provision: Europe | Europe | £19,800 | Lead | The Co-operative Group | Jan 07 | Jun 07 |
| New Directions in Schools Provision: Africa | East Africa | £19,800 | Lead | Centre for British Teaching | Mar 07 | Sept 07 |
| Co-operatives & International Development Policy | Global | £500,000 | Lead, no partners | Department for International Development | Apr 08 | Mar 11 |

3.9.2. Loop Systems Relevant Project Experience

2-4 English Street, NI

Client: Downpatrick Property Trust

Value: £600,000

The refurbishment and restoration of a complex of buildings units to accommodate residential and commercial units. These Georgian buildings had some Victorian modifications as well as elements that dated back to medieval times and were in a prominent location in an Historic rural county town. The buildings were purchased by the Trust and reinstated using Heritage Lottery Fund & Townscape Heritage Initiative Grants. Lime plaster was employed extensively and although the roof was re-slatted, the original roof rafters were reused in line with the funders requirements to retain existing character and fabric where possible.

Start Arts project

Client: Start in Salford

Value: £1,065,000

Restoration of a Grade II listed, 19C Methodist school, for use as a Community Arts facility for people experiencing mental health issues or social exclusion. As Brunswick House had been built for an entirely different purpose, and had been adapted by various occupants, the challenge was to restore clarity and order to the building with a minimum of intervention on a comparatively low budget and a 'Green Specification' where possible. A new gallery was also introduced at the top of the building and accessibility improved with a new lift and external ramps.

Bradford Cathedral Centre

Client: As Above

Value: TBC

Feasibility study for a Grade II listed building in Bradford City Centre comprising:

- Brief development
- Analysis of existing & proposed activities
- Discussions with conservation officer
- Spatial diagrams and models to illustrate how the building could be reordered to fulfill the criteria required by the brief.

Rademon Non-Subscribing Presbyterian Church

Client: As Above**Value: £286,000**

The refurbishment of a Presbyterian Barn Church built in 1787 and Grade A listed due its historical status (It was used as a model for some of the first Barn Churches constructed in USA). The total contract value of £286,000 was partly funded by the local Environment & Heritage Service.

Blackburn CVS Hub**Client: BwD CVS****Value: £1 million**

A space planning and brief forming exercise for Blackburn with Darwen CVS to establish their requirements for a central, community- focused building to create a central hub for the sector with additional spaces that could be rented to ensure the sustainability of the project through regular income. Following this, the client acquired a Georgian public house with a view to refurbishing and extending it. The listed building is located on the edge of the Blackburn's Conservation Area. A sensitive addition to the building was designed to satisfy Local planning requirements and respect the historical nature of the existing building. The proposals incorporate sustainable building practices, materials and methods of construction along with renewable energy sources to ensure the development has minimal impact on the environment.

4. Development of the project

4.1. Chronology

2000

The National Co-operative Archive and the management of the Rochdale Pioneers Museum were transferred to the Co-operative College. At that time, they were operated as a single unit, with a staff of one professional librarian and two Museum Wardens.

The College recognised the importance of the heritage collections as learning resources and started to move towards professional standards of service in the Archive and Museum. This process included cataloguing to modern Museum and Archive standards and the institution of proper documentation systems.

The College adopted as one of its Strategic *Objectives* “*To transform the Rochdale Pioneers Museum and the National Co-operative Archive into accessible lifelong learning resources*”. The Archive and Museum staff are included within the Colleague Development Programme run annually by the College.

2001

An Archive Committee was established to bring together academics, co-operative historians and the Museum’s curatorial advisor with representatives of the co-operative societies whose collections are held by the Archive to oversee the day to day running of the Archive and Museum.

The Co-operative College relocated to Manchester bringing the archive collections and museum geographically closer together.

The Rochdale Pioneers Museum achieved Registered Museum status.

2003

Improvements to the storage conditions for the National Co-operative Archive, with temperature control and the provision of almost 900 linear metres of BS5454 compliant shelving.

Appointment of a consultant to work on the development of an application to the Heritage Lottery Fund for a Project Planning Grant on the development of the Archive and Museum.

2004

Staffing for the Archive strengthened with the addition of a professionally qualified Archivist.

Co-operative College awarded Investors in People and ISO 2001 for Quality Systems.

Successful HLF PPG bid.

2005 onwards

Contact with co-operative museums and archives in other EU countries, initially through the College led Grundtvig Cocade project on member education in Europe, with the intention to develop a European network.

The long standing group of volunteers, the Friends of the Rochdale Pioneers Museum supplemented by volunteers working in the Archive.

2005

Start of work on HLF PPG bid with appointment of Project Officer and recruitment of consultants to work on Audience Development Plan, Conservation Management Plan, Information and Communication Technology Strategy and Building Survey.

Work with history teachers from the Co-operative sponsored Business and Enterprise Colleges to use materials from the Archive and Museum to develop learning resources and lesson plans.

Development of banner project with the schools, using historical banners to stimulate ideas on contemporary banner making.

Participation in a series of events organised by NIACE and held at National Trust properties in the West Midlands linked to the 60th anniversary of VE day, using the collections in collaboration with others as lifelong learning resources.

MLA North West "Learning Links" project, Assistant Archivist working with a primary school teacher on the development of a learning resource on the co-operative movement and the Second World War "Bombed, Blitzed and Bunkered but Never Beaten".

2006

Consultation at Co-operative Congress, the national delegate conference of the co-operative movement on the development of the project with discussion and questionnaires. Unanimous approval of resolution:

"Congress welcomes in principle the establishment of a Co-operative Heritage Trust to be custodian of the heritage assets of the National Co-operative Archive and the Rochdale Pioneers Museum on behalf of the co-operative movement, subject to agreement on the detailed governance arrangements between Co-operatives^{UK} and the Co-operative College. Congress also welcomes the formation of the Co-operative Heritage Fund to ensure the long-term preservation of the movement's heritage."

Establishment of the Co-operative Heritage Fund to receive regular and one off donations from co-operative societies, other organisations and individuals.

Staffing for the Museum strengthened with the addition of a third Warden, with a Blue Badge Guide qualification.

Consultation questionnaires on the development of the Museum and Archive to delegates at European Assembly of the International Co-operative Alliance.

Development of bid for Designated Collections status for the Archive.

2007

The Archive achieved Designated Collections status for the entire collection.

“An outstanding record of the development of co-operation from its beginnings in the nineteenth century to the present day, including many rare and unique records such as the correspondence of the ‘Father of Co-operation’ Robert Owen.

As well as the history of co-operation, 2007 the Archive covers a wide range of subject areas including advertising, education, employment, funerals, gender studies, politics, retailing and youth groups.”

Museums, Libraries and Archives press release 18 June 2007

Congress passed the following resolution unanimously:

“Congress welcomes the establishment of the Co-operative Heritage Trust and the Co-operative Heritage Fund and recognises their importance in safeguarding the movement’s heritage assets for the benefit of future generations.

Congress supports the transfer of the principal heritage assets, the Rochdale Pioneers Museum and its collections and the National Co-operative Archive to the Trust.

Congress further recognises the responsibilities of the movement to ensure the safekeeping of its heritage for future generations and urges all societies and co-operators to contribute to the Co-operative Heritage Fund to ensure there are adequate financial resources to enable the newly established Trust to meet its objectives”.

The Co-operative Heritage Trust established in September.

A £3 million endowment fund for the Co-operative Heritage Trust was established by the Co-operative Group.

The development of architectural options for the Rochdale Pioneers Museum building in consultation with Rochdale Council’s Conservation Officer and the Impact Partnership, the Property service for Rochdale Metropolitan Borough Council.

Development of an outline Interpretive Plan for the Rochdale Pioneers Museum and the start of outline creative approach for the interior design.

Appointment of Project Archivist for a one year project looking at the archives of the Co-operative Group and the development of funding to enable post to be made permanent from March 2008.

Discussions with the International Co-operative Alliance about their archive.

Development of Volunteers manual and start of work towards Investors in Volunteers status.

2008

Staffing for the Archive strengthened with the addition of a second permanent professionally qualified Archivist (post holder previously on one year project).

MLA Their Past, Your Future project with Urbis called "A Woman's Place" involving an exhibition and educational workshops on women and conflict.

The Rochdale Pioneers Museum received Visitor Attraction Quality Assurance accreditation.

Bid to HLF submitted, informed by consultation and the work undertaken through the HLF PPG.

4.2. Options Appraisal

During the initial phase of the options appraisal process, the College sought to identify the widest range of possible options to address the long-term needs of the Archive and Museum. The College worked with consultants at Culture Works to investigate the overall vision of the Archive and Museum, and to develop priorities for its strategic development, particularly with reference to an HLF Stage 1 bid. The overall objectives of this vision exercise were:

- To identify the heritage assets that the College 'owns'.
- To establish for each of these assets:
 - What are their strengths?
 - What are their weaknesses?
 - What are the opportunities for the development/exploitation of these?
 - What are the threats that could affect each?
 - What are the risks of inaction?
- Taking the outcomes of the above, what are the priorities?

The priorities were first presented to the Archive Committee, and were discussed further through consultation with a series of stakeholders.

Specialist consultants were asked to assess the current state of the Archive and Museum and their future potential. Through the PPG, the College commissioned a series of reports:

- Access Audits, (Archive and Museum)
- Audience Development Plan
- Conservation Management Plan
- ICT Strategy
- Preliminary Building Survey (Museum)

Based on these reports, and upon consultation with potential partners and stakeholders, the strategic planning team compiled a 'long list' of recommendations. The team reviewed this list, rejecting the obviously non-viable options and developing a 'short list.'

Descriptions of these options were then produced, along with basic comparative costings and informed the development of the project.

5. Strategic Background

5.1. Project Aims

The project will enable the Co-operative Heritage Trust to move from safeguarding and preserving co-operative heritage to using it to inspire a wider public about the extraordinary history and development of the worldwide co-operative movement, its heritage and relevance. This will transform the collections in the following ways:

- **Preservation:** supporting activity to professional standards and ensuring the long-term care of this North West Heritage.
- **Access:** increasing the audience for its collections and overcoming cultural, physical and other obstacles; involving community groups and individuals in understanding their co-operative heritage; involving people who are unable to visit through digitisation programmes.
- **Education:** development of collections as learning resources; renewing interpretive displays; developing educational materials; building links with the education sector from schools to higher education.
- **Capacity:** providing bridge funding for education and outreach staff, ensuring the Museum and Archive have appropriate staffing, volunteers and resources

5.2. Organisational Fit

5.2.1. The Co-operative Heritage Trust

Sections 3.1 and 3.2 of this Business Plan describe the trusts' charitable objectives, mission and strategic objectives. This project has a direct link with these as by making the Museum and Archive more accessible, increasing the capacity and preserving the collection we can turn them into life long learning resources that are widely accessible.

5.2.2. The Co-operative College

One of the strategic objectives of the Co-operative College is;

To promote and develop the use of our co-operative heritage for the benefit of current and future generations.

The College has a clear commitment to this and has devised a range of Success Indicators (shown below) by which it can measure progress:

Success Indicators

- A wider range of funding streams supporting the work of the Archive and Museum.
- Submission of a bid to the Heritage Lottery Fund for capital work on the Archive and Museum.
- Achieving Accredited Museum status

- Effective systems for protecting the physical knowledge base and co-operative heritage.
- Participation in relevant networks to build long-term co-operative partnerships
- Levels of user satisfaction measured by beneficiary and partner evaluation.
- Maintenance of national and international standards.
- Increasing the number of volunteers to support the work of the archive and museum.

-

(Extract from Co-operative College Strategic Plan 2008 – 2010)

5.2.3. How the ROCHDALE projects fits with local and national strategies.

Preservation: supporting activity to professional standards and ensuring the long-term care of this North West Heritage. Preservation is fundamental to the other aims which involve increasing the use of and access to the collections and fits with strategies such as:

- National Preservation Office a national preservation strategy for library and archive collections in the United Kingdom and Ireland: principles and prospects.
- Museum Accreditation.
- Archive Designation.

Access: increasing the audience for its collections and overcoming cultural, physical and other obstacles; involving community groups and individuals in understanding their co-operative heritage; involving people who are unable to visit through digitisation programmes. This aim fits with strategies which encourage involvement by all sections of the community such as:

- Rochdale Metropolitan Borough Council Race Equality Scheme 2005-2008.
- The Rochdale Pride Partnership, the local strategic partnership for the Borough of Rochdale.
- Manchester Cultural Strategy 2002 and Manchester Community Strategy 2002, which set out a vision for cultural development for the decade 2002-2012.
- Celebrating our cultural heritage: Investing in a future for all the MLA NW five year strategy for museums and galleries in England's North West.
- Inspiring Creativity, Celebrating Identity, the MLA Partnership Strategic Statement 2007-2010.
- DCMS Libraries, Museums, Galleries and Archives for All: Co-operating across the sectors to tackle social exclusion, 2001.
- MLA Access All Areas - enabling inclusion for Museums, Libraries and Archives, 2004.
- MLA Inspiring Learning for All, 2004.

- Standing Conference on Archives and Museums Access to Archives, 1999.
- MLA Disability Equality Scheme 2007-2010.
- English Heritage Easy Access to Historic Properties, 2000.
- Museum Association Ethical Guidelines for Access, 1999.
- Archives Task Force Listening to the Past, Speaking to the Future, 2004.
- MLA New Directions in Social Policy: Communities and Inclusion Policy for museums, libraries and archives, 2004.

Education: development of collections as learning resources; renewing interpretive displays; developing educational materials; building links with the education sector from schools to higher education. This fits with strategies such as:

- Celebrating our cultural heritage: Investing in a future for all the MLA NW five year strategy for museums and galleries in England's North West.
- Inspiring Creativity, Celebrating Identity, the MLA Partnership Strategic Statement 2007-2010.
- DCMS Libraries, Museums, Galleries and Archives for All: Co-operating across the sectors to tackle social exclusion, 2001.
- MLA Inspiring Learning for All, 2004.
- Archives Task Force Listening to the Past, Speaking to the Future, 2004.

Capacity: providing bridge funding for education and outreach staff, ensuring the Museum and Archive have appropriate staffing, volunteers and resources. This fits with all of the strategies mentioned above, by ensuring the capacity to develop links with local communities and all parts of the education sector and the MLA Learning for Change strategy.

6. The Project

6.1. Introduction

This section provides an overview and information about the ROCHDALE (Renewing Our Co-operative Heritage, Developing the Archive and Learning Experiences) project, the new facilities that it will create and the services that will be provided as a result.

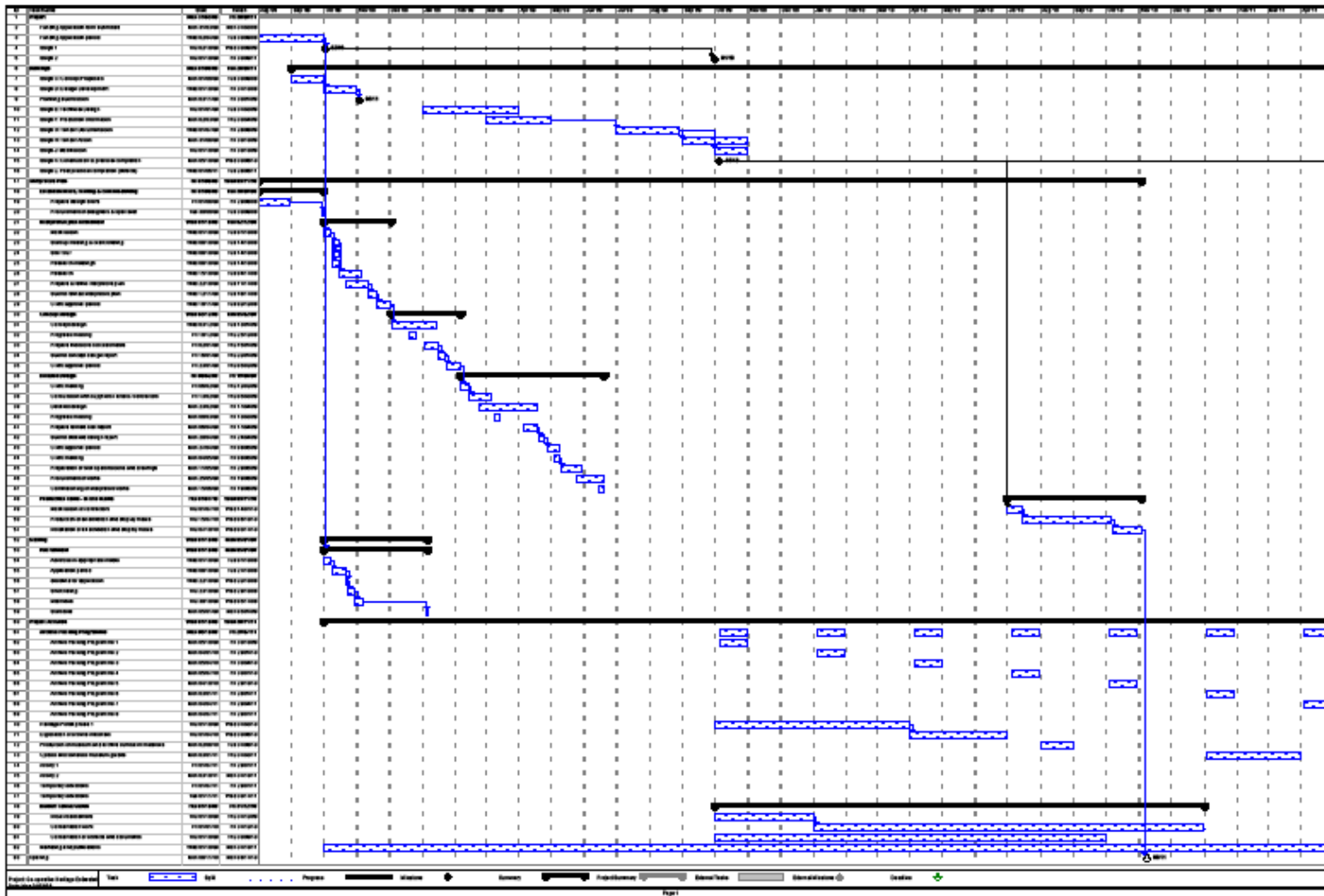
6.2. Overview

The National Co-operative Archive (NCA) and the Rochdale Pioneers Museum (RPM) document a journey from idealistic aspiration to ethically informed action which provides an inspiration today to those diverse communities embarking on that same journey. The RPM at 31 Toad Lane is the original location where the Rochdale Equitable Pioneers started their first store in 1844, widely regarded as the birthplace of the world-wide co-operative movement. Today, the Grade II listed building is embedded into the local cultural heritage as the centrepiece of Rochdale's Toad Lane Conservation Area, and is a Registered Museum, as well as illustrating the transformation of the UK co-operative movement into today's global phenomenon.

The building itself as well as the artefacts and Archive documents, graphically illustrate the organisational means whereby self help was used to create productive employment, overcome poverty and achieve social integration. The NCA is recognised as a Designated collection.

The project aims to transform the collection into a resource capable of inspiring a whole new audience with extraordinary narratives of "ordinary" predecessors, who like themselves, faced and overcame social and economic exclusion through association and self help.

6.3. Project Timetable



A full version of this can be found in Appendix A

6.4. Cost Breakdown

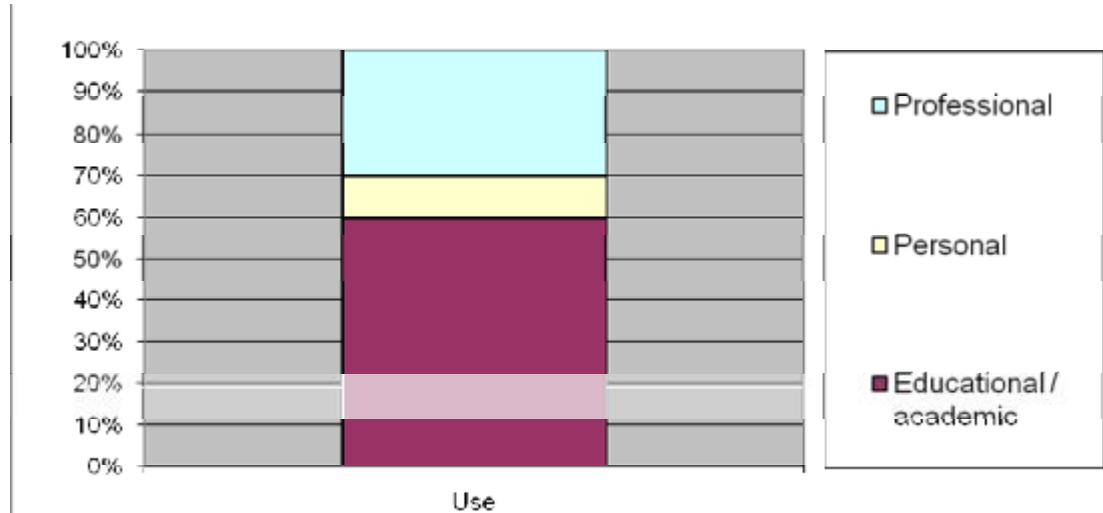
| Item | £ | |
|---|------------------|--------------|
| 1 Construction Costs | | |
| Estimated build costs | 539,298 | |
| Contractors preliminaries | 97,074 | |
| Contingency | 95,456 | |
| Inflation | 4,171 | |
| Sub total | 735,998 | 31.7% |
| 2 Professional Fees | | |
| Architects | 75,072 | |
| Other consultants | 66,387 | |
| Sub total | 141,459 | 6.1% |
| 3 Other Fees re Construction | | |
| Estimated planning Fees | 600 | |
| Estimated building control fees | 3,000 | |
| Insurances | 5,000 | |
| Ground condition survey | 10,000 | |
| Sub total | 18,600 | 0.8% |
| 4 Other capital costs | | |
| Exhibition display works | 176,100 | |
| Reception area | 10,000 | |
| Equipment for Education Area | 5,000 | |
| Contractors preliminaries | 14,528 | |
| Contingency | 17,610 | |
| Sub total | 223,238 | 9.6% |
| 5 Other fees re Exhibition works | | |
| Installation | 31,236 | |
| Design Fee | 59,868 | |
| Sub total | 91,104 | 3.9% |
| 6 Education and Access | | |
| Heritage portal phase 1 | 27,000 | |
| Archive - production of curriculum materials | 45,000 | |
| Museum production of curriculum materials | 45,000 | |
| Update / translate museum guides | 20,035 | |
| Activities | 15,000 | |
| Temporary exhibition | 25,000 | |
| Marketing and publication | 49,300 | |
| Sub total | 226,335 | 9.8% |
| 7 Conservation | | |
| Archive Packaging Programme | 24,000 | |
| Digitisation (figure taken from consultants report) | 28,963 | |
| Banner Preservation | 104,650 | |
| Conservation of artifacts and documents | 100,100 | |
| Sub total | 257,713 | 11.1% |
| 8 Staff Costs | 347,007 | 15.0% |
| 9 Contingency (inc in 1 & 2 above) | 113,066 | |
| 10 Inflation (inc in 1 above) | 4,171 | |
| 11 Irrecoverable VAT | 278,821 | 12.0% |
| 12 Total Project Costs | 2,320,275 | 100% |

7. The Market

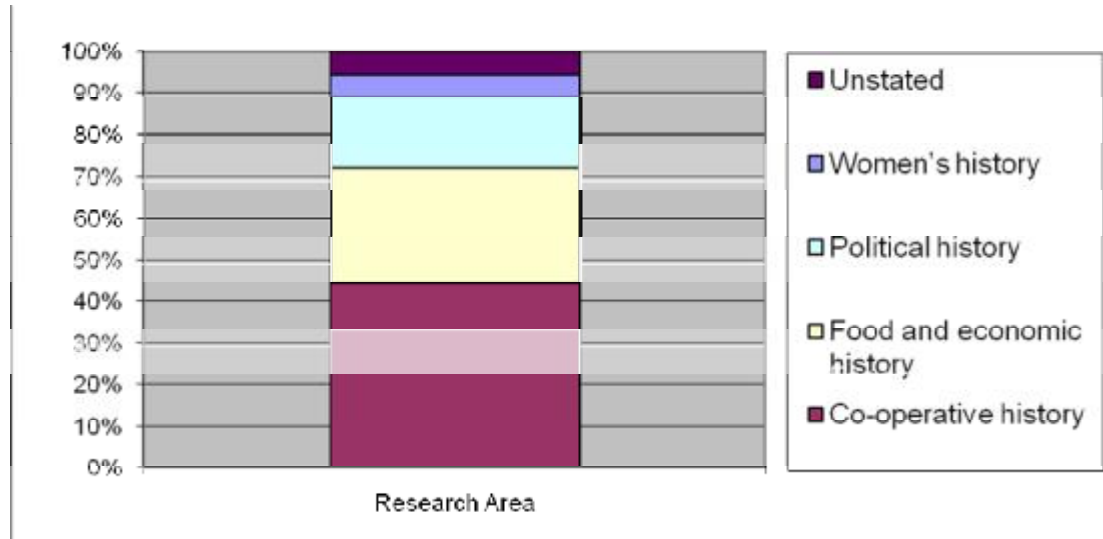
7.1. Archive existing visitor volume and profile

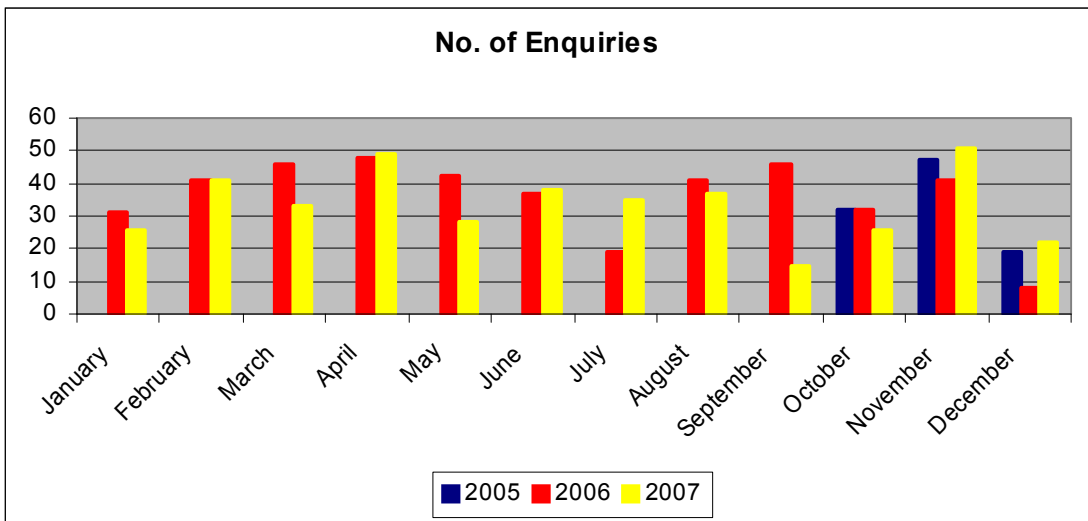
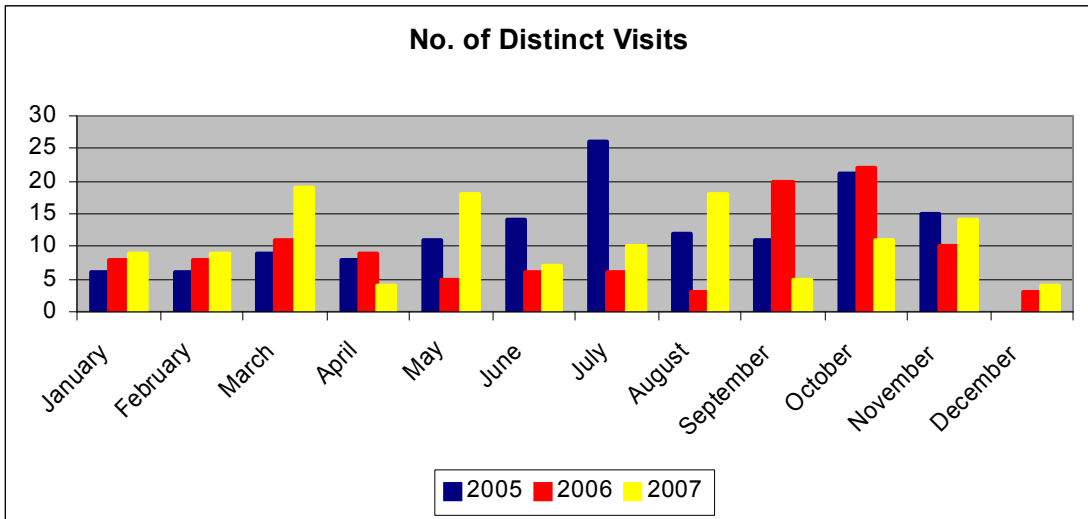
The graphs below show the use of the archive by researchers as well as the subjects being researched. The figures were compiled by consultants working on the Audience Development Plan.

The Use of the Archive

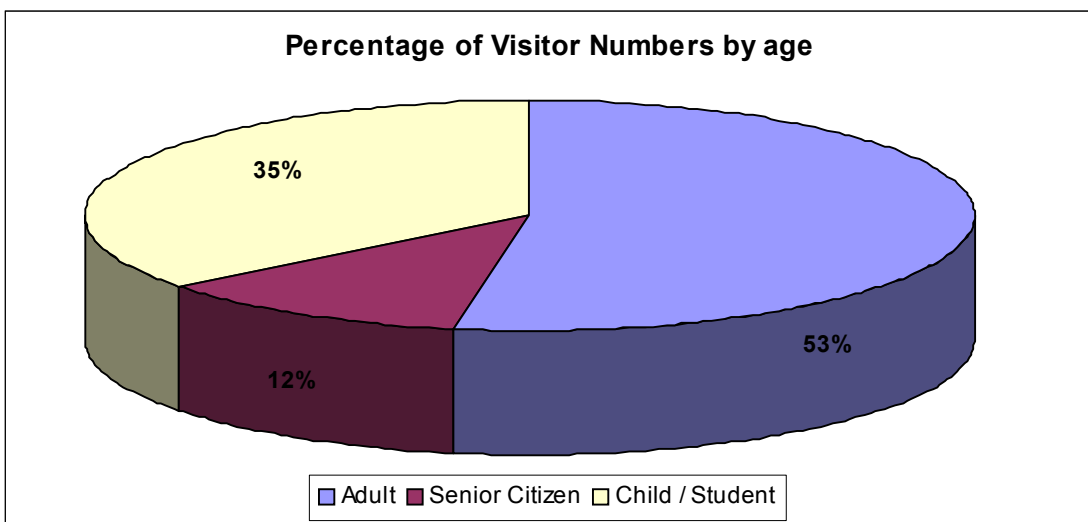


Research Areas





7.2. Museum existing visitor volume and profile



8. Financial Appraisal

8.1. Strategic Overview

The day to day management of the Co-operative Heritage Trust and of the project will be undertaken by the Co-operative College.

The income from the Co-operative Heritage Fund, launched in 2006, and the interest from the endowment fund established in 2007, are designed to meet the core running costs of the Trust, with fundraising to build the funds to provide long term security.

8.2. Project Funding

A fundraising strategy has further identified a range of funding opportunities at UK, European and International levels. The fundraising strategy will be reviewed annually by the trustees of the Co-operative Heritage Trust. The Co-operative Colleges' Leadership team will oversee the implementation of the strategy and provide regular reports to the Archive Committee and Trustees.

The Co-operative College is a member of the Fundraising Standards Board and is committed to best practice and the maintenance of high standards in its fundraising.

For further details on the fundraising strategy please refer to the Fundraising Plan submitted as part of this application.

8.3. Income

The Trust has secured a £3 million donation from the Co-operative Group. to establish a permanent endowment. This has been invested so that the interest generated can be used to support the ongoing revenue costs for the Heritage Trust. The Trust Treasury Policy aims to achieve a rate of return of at least 5% per annum, which will generate £150,000 income. Currently it is achieving an interest rate of 5.6% until end June 2008, which will mean an income of £84,000 in the 1st half of 2008.

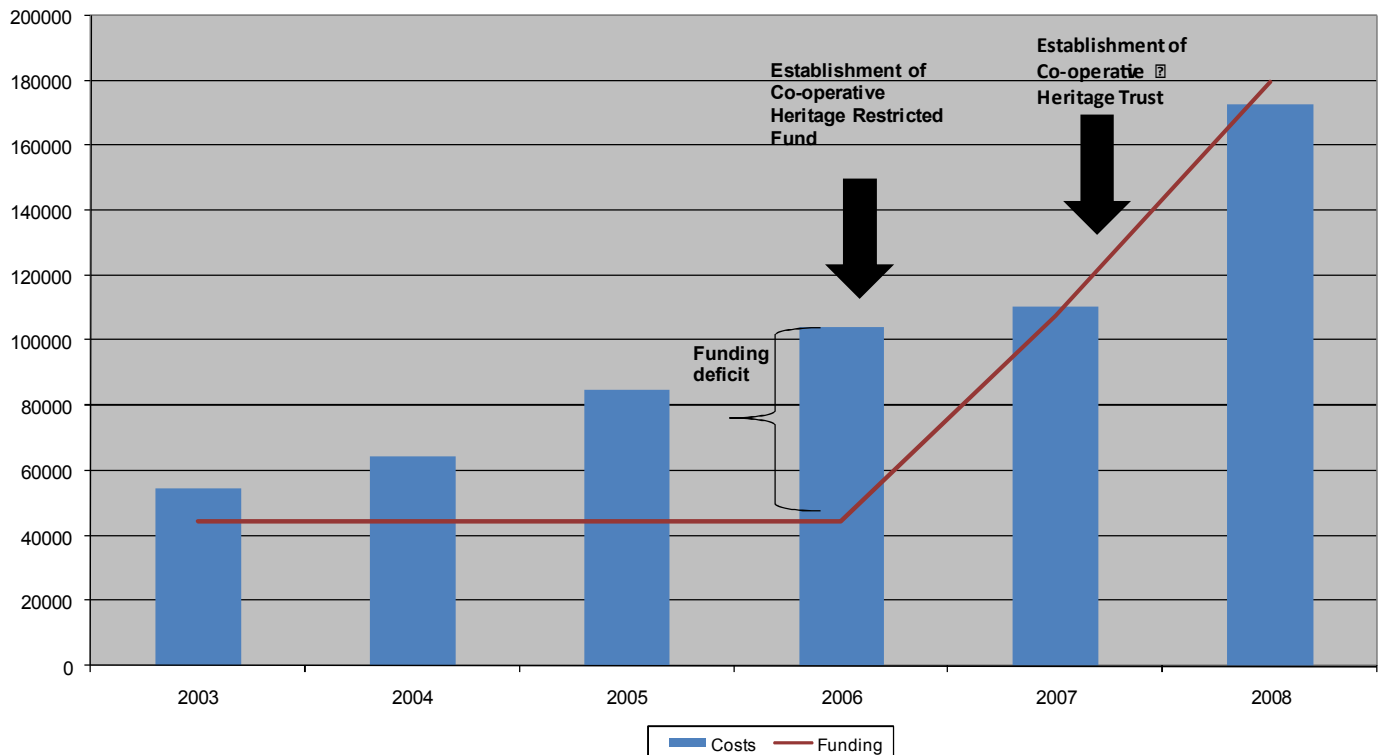
In 2006 the College launched the Co-operative Heritage Restricted Fund; this fund is also used to support the ongoing revenue costs. Currently 18 Co-operative Societies and related organisations regularly support this fund which at this time has annual donations circa. £43k. The Co-operative Heritage Restricted Fund was transferred to the Co-operative Heritage Trust on 1 January 2008.

The Trust, as part of its fundraising strategy, plans to encourage additional contributions from organisations and individuals to both these funds.

8.4. Expenditure

Since 2001 the core costs of the National Co-operative Archive and Rochdale Pioneers museum have been met by the Co-operative College with contributions from Co-operativesUK and the Co-operative Group. The graph below demonstrates how the costs have grown but the funding remained static, meaning the Co-operative College stood the loss for the ongoing costs of these.

Archive and Museum Funding Received v Actual Costs



With the £3million endowment from the Co-operative Group and the Co-operative Heritage Restricted fund this funding gap has now been filled and the on going running costs of both the museum and the archive can be met. Therefore any funding the project receives will not be used to fund the running costs but rather the costs of transforming the Museum and Archive into life long learning resources. The majority of this is capital expenditure and the associated costs, which account for 56.2%, with the remainder going on conservation (11.8%), education and access (4.7%), staffing costs (15.3%). Of these staffing costs 8.7% relate to new staff who will be employed on fixed term contracts for the duration of the project.

Appendix B shows the budget of the Co-operative Heritage Trust for 2008 to 2010 as approved by the Trustees.

Appendix C shows the breakdown of the project costs and Appendix D profiles the monthly spend.

9. Management & Staff

This section demonstrates that the management and staffing structure in place has the experience, competencies, specialist knowledge and capacity to deliver the project on time and within budget.

In addition, it demonstrates that when the project has been delivered, appropriate resources will be in place to manage the redeveloped museum and archive to ensure that the long term benefits of the project are realised.

9.1. Development Phase

The Co-operative College is led by a team, who are each specialists in their own areas of responsibility. This Leadership Team consists of five members who are dedicated to the realisation of this project and who, between them, have 135 years of experience of managing a wide of educational, academic and commercial projects.

However in undertaking the next stage it has been recognised that additional professional help is required both to supplement existing resources and to cover specialist areas which the organisation does not have in-house. To ensure the success of the project existing staff will work in close co-operation with the appointed professional and consultant colleagues.

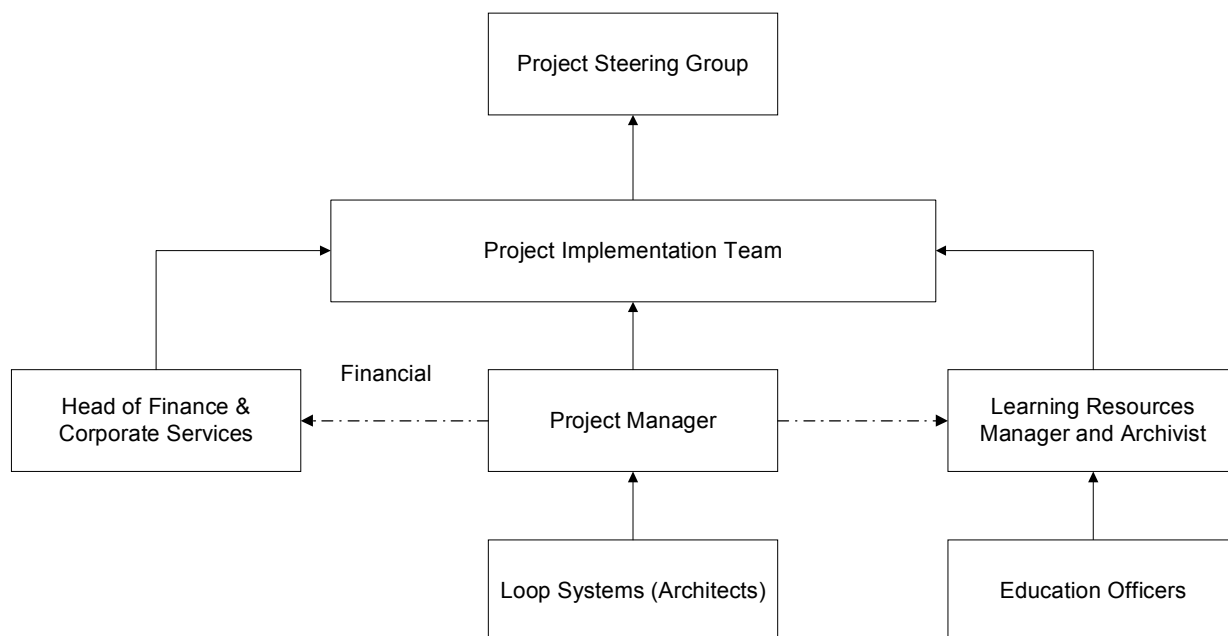
9.1.1. Steering Group

The project steering group will involve key stakeholders and provide a high level strategic overview of the project. It will be chaired by the Chair of the Co-operative Heritage Trust trustees (who also serves as chair of the Archive Committee) with additional members from:

- Co-operatives^{UK}
- The Co-operative Group
- The Co-operative College
- The 'Friends of the Rochdale Pioneers Museum'
- The Peoples History Museum
- Touchstones
- The Network of Co-operative Business and Enterprise Colleges (secondary schools)

9.1.2. Management Team

The diagram below represents how the project will be managed on an operational level. The operational implementation will be overseen by a Project Implementation Team chaired by Mervyn Wilson, Chief Executive and Principal of the College with Gillian Lonergan, Learning Resources manager and Archivist, Emma Willder, Head of Finance and Corporate Affairs, the appointed Project Manager and Loop Systems (Lead consultants) as members. It will meet at least fortnightly to monitor and oversee progress on the various strands of the overall project.



| Senior Manager | Project Responsibilities |
|---|--|
| Emma Willder Head of Finance and Corporate Services | Overall financial responsibility ensuring that project budgets are met |
| Mervyn Wilson Chief Executive and Principal | Overall responsible for ensuring project delivery |
| Gillian Lonergan Learning Resources Manager and Archivist | Lead on content and education development. Specific responsibility for maintaining service during the project implementation |
| Project Manager | Operational co-ordination with the range of consultants and contractors |
| Loop Systems Lead Consultants | Responsibility for ensuring that the build comes in on time and to budget |

9.1.3. Project Consultants

A number of consultants were used during the development of the Stage 1 application. These are detailed below:

| | |
|---|------------------------------|
| Creative Cultures | Audience Development Plan |
| Margaret Crockett, Janet Foster and Jonathan Rhys-Lewis | Conservation Management Plan |

| | |
|---------------|--|
| Culture Works | Information & Communication Technology Strategy |
| Loop Systems | Architects |
| PLB Limited | Museum Designers |

9.2. Operational Phase

9.2.1. Day to day operations

A Project Manager will be appointed on a 0.5 FTE. The Project Manager will report direct the College Chief Executive and work with an implementation team comprising the Head of Learning Resources and Archivist and the Head of Finance and Corporate Affairs. The project manager will manage consultants, and establish regular project review meetings with Loop Systems, the lead consultants and other consultants as appropriate. Education staff will report to the Learning Resources Manager and Archivist

9.2.2. Additional staff

The development of curriculum resources for Key Stages 2 – 4 will be undertaken by specialist in this area. We will recruit 3 part time staff that will each have responsibility for a Key Stage.

The education staff will work closely with teachers from the network of Business and Enterprise Colleges and the rapidly growing Co-operative Trust Schools to develop and pilot a wide range of resource material using the collections. They will also draw on the team of College Associates currently working with schools to build on existing networks and experience.

10. Assessing Risk

The risk register considers the potential threats to the delivery of the project and subsequently the Heritage Trusts ability to deliver the business plan.

| | Potential Risk | Probability | Effect | Rank | Owner | Recommended Actions / Mitigation |
|----------|--|-------------|--------|------|-----------|--|
| 1 | Business and Commercial | | | | | |
| | Visitor numbers | Low | Low | 2 | CC | Review marketing strategy and targets. |
| | Visitor breadth | Low | Med | 1 | CC | Review Audience Development Plan |
| 2 | Project Funding | | | | | |
| | HLF | Med | High | 1 | CC | HLF Stage 1 application |
| | Match Funding | Low | Med | 2 | CC | £3m permanent endowment secured for ongoing revenue costs. Co-operative Heritage Restricted Fund established in 2006 with current donations circa £43k |
| 3 | Confirmation & sign off of client brief | | | | | |
| | Building | | | | | Planning permission required but close liaison with the local conservation officer has been maintained and will be ongoing |
| | Exhibition display | Low | | | | |
| | Planning permissions | Med | High | 1 | CC & Loop | Close liaison with the local conservation officer has been maintained and will be ongoing |
| 4 | Project Organisation and Management | | | | | |
| | Project organisation change | Low | High | | CC | |

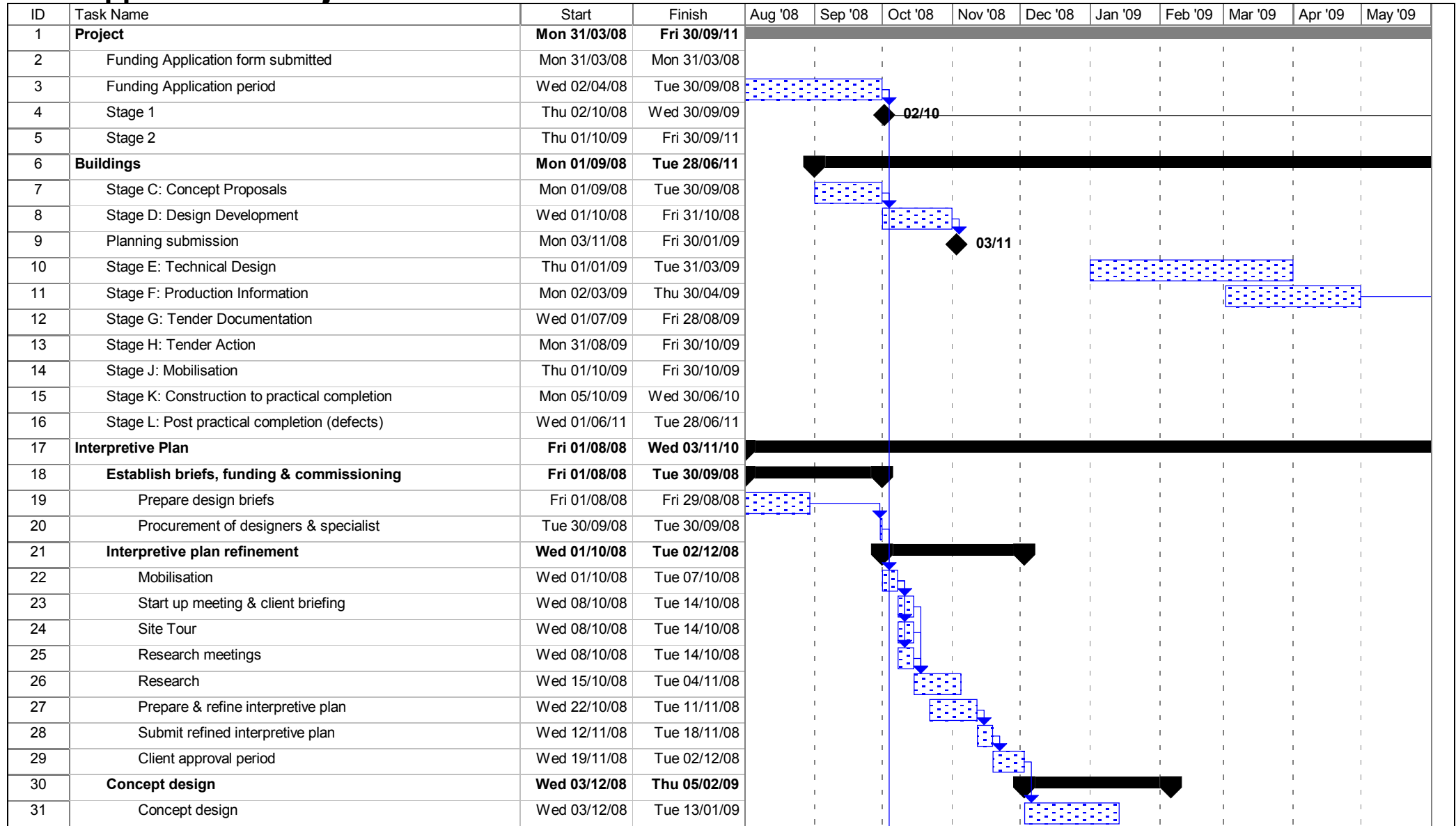
| | Potential Risk | Probability | Effect | Rank | Owner | Recommended Actions / Mitigation |
|----------|--|-------------|--------|------|------------------------------------|---|
| 5 | Design Development | | | | | |
| | Dealing with implications of repairs to existing buildings | Low | High | | Loop Systems | Identify at Stage E |
| | Break-ins to existing buildings | Low | High | | Loop Systems / Building Contractor | Loop to discuss with contractor |
| | Condition of existing systems | | | | | |
| | Ground survey | Low | High | | | |
| 6 | Financial and Programme Overruns | | | | | |
| | Project Budget | Low | High | | All | CC to monitor and liaise regularly with Loop and contractors |
| | Procurement – tender price levels | | | | | |
| | Accuracy of estimating to compile project budget | Low | Med | | | Stage 1 application process will help |
| 7 | Recruitment | | | | | |
| | Recruitment of suitable staff | Low | High | 1 | CC | Advertise in appropriate media and ensure salary levels are at least market rate. |

11. Monitoring & Evaluation

| Aim | Action | Measure of Success |
|---|---|--|
| Preservation | | |
| Activity to professional standards | Continued monitoring of Archive and Museum against best practice. Development of policies and procedures. | Maintenance of recognition of high standards - Designated Collections status for Archive and Accredited Museum status (application in May 2008) |
| Long term preservation of collections | Regular surveys of condition of collections. | Maintenance of high standards and regular programme of conservation work as appropriate. |
| Access | | |
| Increasing the audience for heritage collections | Increase existing audiences and target new audiences Develop links with groups involved with under represented groups. | Exceeding targets set in Audience Development Plan. Increase in numbers of enquiries. Feedback from user surveys. Postcode surveys of visitors and users. |
| Overcoming cultural, physical and other obstacles | Improvements in physical accessibility. Provision of materials and activities targeted to under represented groups. | Full access to Museum and Archive. Increase in usage of collections by under represented groups. |
| Education | | |
| Renewal of interpretive displays | Project will renew displays. Regular updating to material for interactive kiosks. | Displays engage visitors to Museum, shown by user surveys. |
| Development of educational materials | Project staff to work on materials for all Key stages and adult education. | Materials disseminated to schools and colleges and number of uses. Materials accessible through the internet. |
| Building links with education sector | Project and permanent staff involved in development of links from primary schools to | Increase in number of educational users. Increase in number of collaborative projects. |

| Aim | Action | Measure of Success |
|---|---|--|
| | adult education. | |
| Capacity | | |
| Appropriate staffing and resources | Development of Co-operative Heritage Fund and endowment to enable recruitment of additional staff | Appointment of permanent Education Officer at end of project Additional Museum Warden. |
| Development of work with volunteers and work placements | Publicise range of volunteer work available and increase recruitment. Further develop relationship with universities providing professional courses and schools involved in work experience. | Increase in number of volunteers and in quality of volunteers' experience. Achievement of Investors in Volunteers accreditation |

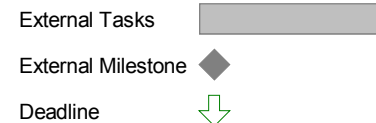
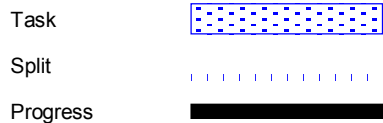
Appendix A - Project Timescales



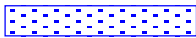








| | | | | | | |
|---|----------|--|-----------------|--|--------------------|--|
| Project: Co-operative Heritage Estimate Date: Wed 02/04/08 | Task | | Milestone | | External Tasks | |
| | Split | | Summary | | External Milestone | |
| | Progress | | Project Summary | | Deadline | |

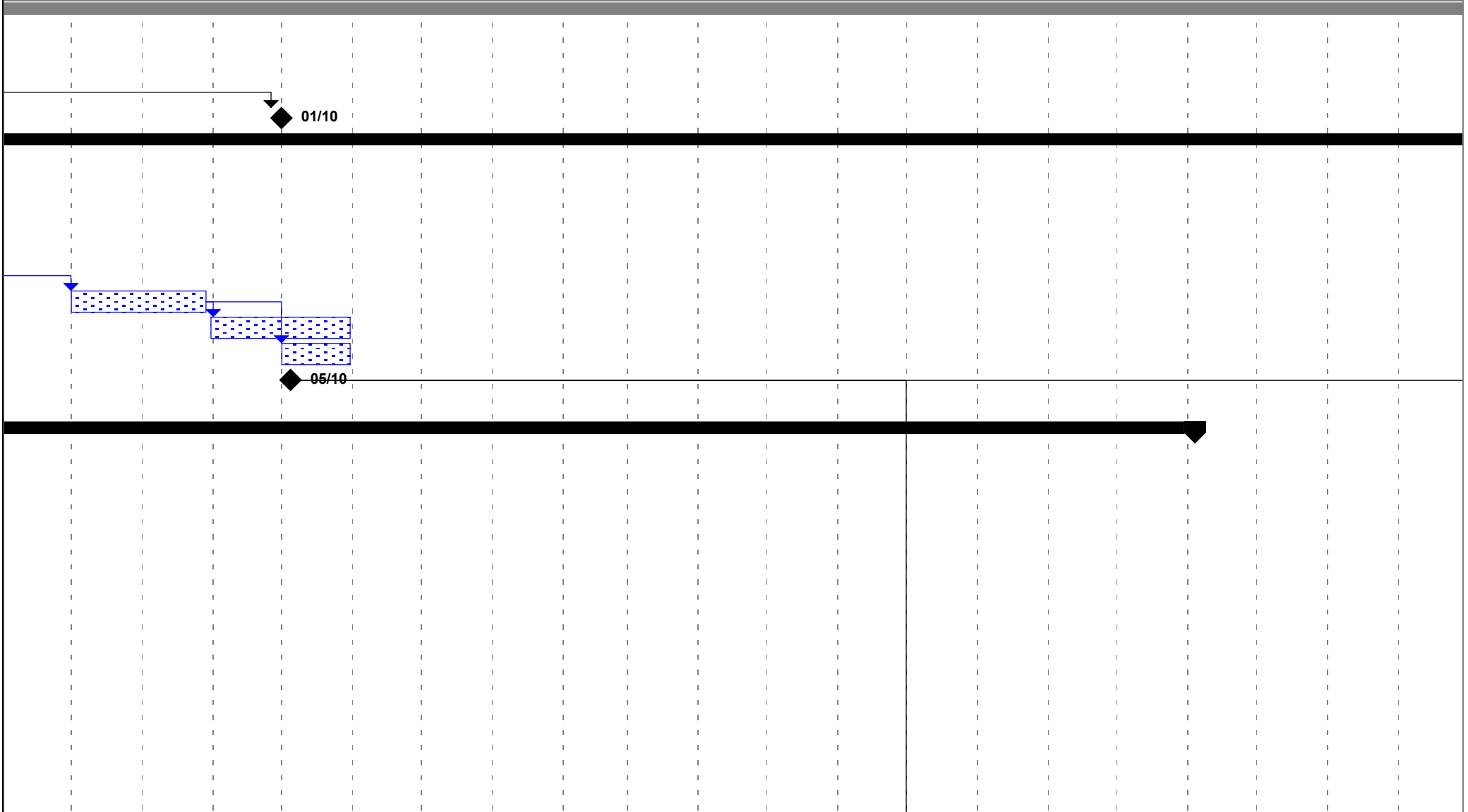
| ID | Task Name | Start | Finish | Aug '08 | Sep '08 | Oct '08 | Nov '08 | Dec '08 | Jan '09 | Feb '09 | Mar '09 | Apr '09 | May '09 |
|----|---|---------------------|---------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| 32 | Progress meeting | Fri 19/12/08 | Thu 25/12/08 | | | | | | | | | | |
| 33 | Prepare indicative cost estimates | Fri 02/01/09 | Thu 15/01/09 | | | | | | | | | | |
| 34 | Submit concept design report | Fri 16/01/09 | Thu 22/01/09 | | | | | | | | | | |
| 35 | Client approval period | Fri 23/01/09 | Thu 05/02/09 | | | | | | | | | | |
| 36 | Detailed Design | Fri 06/02/09 | Fri 19/06/09 | | | | | | | | | | |
| 37 | Client meeting | Fri 06/02/09 | Thu 12/02/09 | | | | | | | | | | |
| 38 | Consultation with suppliers / artists / contractors | Fri 13/02/09 | Thu 05/03/09 | | | | | | | | | | |
| 39 | Detailed design | Mon 23/02/09 | Fri 17/04/09 | | | | | | | | | | |
| 40 | Progress meeting | Mon 09/03/09 | Fri 13/03/09 | | | | | | | | | | |
| 41 | Prepare refined cost report | Mon 06/04/09 | Fri 17/04/09 | | | | | | | | | | |
| 42 | Submit detailed design report | Mon 20/04/09 | Fri 24/04/09 | | | | | | | | | | |
| 43 | Client apporval period | Mon 27/04/09 | Fri 08/05/09 | | | | | | | | | | |
| 44 | Client meeting | Mon 04/05/09 | Fri 08/05/09 | | | | | | | | | | |
| 45 | Preparation of final speicfications and drawings | Mon 11/05/09 | Fri 29/05/09 | | | | | | | | | | |
| 46 | Procurement of works | Mon 25/05/09 | Fri 19/06/09 | | | | | | | | | | |
| 47 | Commsioning of interpretive works | Mon 15/06/09 | Fri 19/06/09 | | | | | | | | | | |
| 48 | Production items - in site media | Thu 01/07/10 | Wed 03/11/10 | | | | | | | | | | |
| 49 | Mobilisation of contractors | Thu 01/07/10 | Wed 14/07/10 | | | | | | | | | | |
| 50 | Production of all exhibition and display media | Thu 15/07/10 | Wed 06/10/10 | | | | | | | | | | |
| 51 | Installation of all exhibition and display media | Thu 07/10/10 | Wed 03/11/10 | | | | | | | | | | |
| 52 | Staffing | Wed 01/10/08 | Mon 05/01/09 | | | | | | | | | | |
| 53 | Recruitment | Wed 01/10/08 | Mon 05/01/09 | | | | | | | | | | |
| 54 | Advertise in appropriate media | Wed 01/10/08 | Tue 07/10/08 | | | | | | | | | | |
| 55 | Application period | Wed 08/10/08 | Tue 21/10/08 | | | | | | | | | | |
| 56 | deadline for application | Wed 22/10/08 | Wed 22/10/08 | | | | | | | | | | |
| 57 | Short listing | Thu 23/10/08 | Wed 29/10/08 | | | | | | | | | | |
| 58 | interviews | Thu 30/10/08 | Wed 05/11/08 | | | | | | | | | | |
| 59 | Start date | Mon 05/01/09 | Mon 05/01/09 | | | | | | | | | | |
| 60 | Project Activites | Wed 01/10/08 | Wed 30/11/11 | | | | | | | | | | |
| 61 | Archive Packing Programme | Mon 05/10/09 | Fri 29/07/11 | | | | | | | | | | |
| 62 | Archive Packing Programme 1 | Mon 05/10/09 | Fri 30/10/09 | | | | | | | | | | |

Project: Co-operative Heritage Estimate
Date: Wed 02/04/08

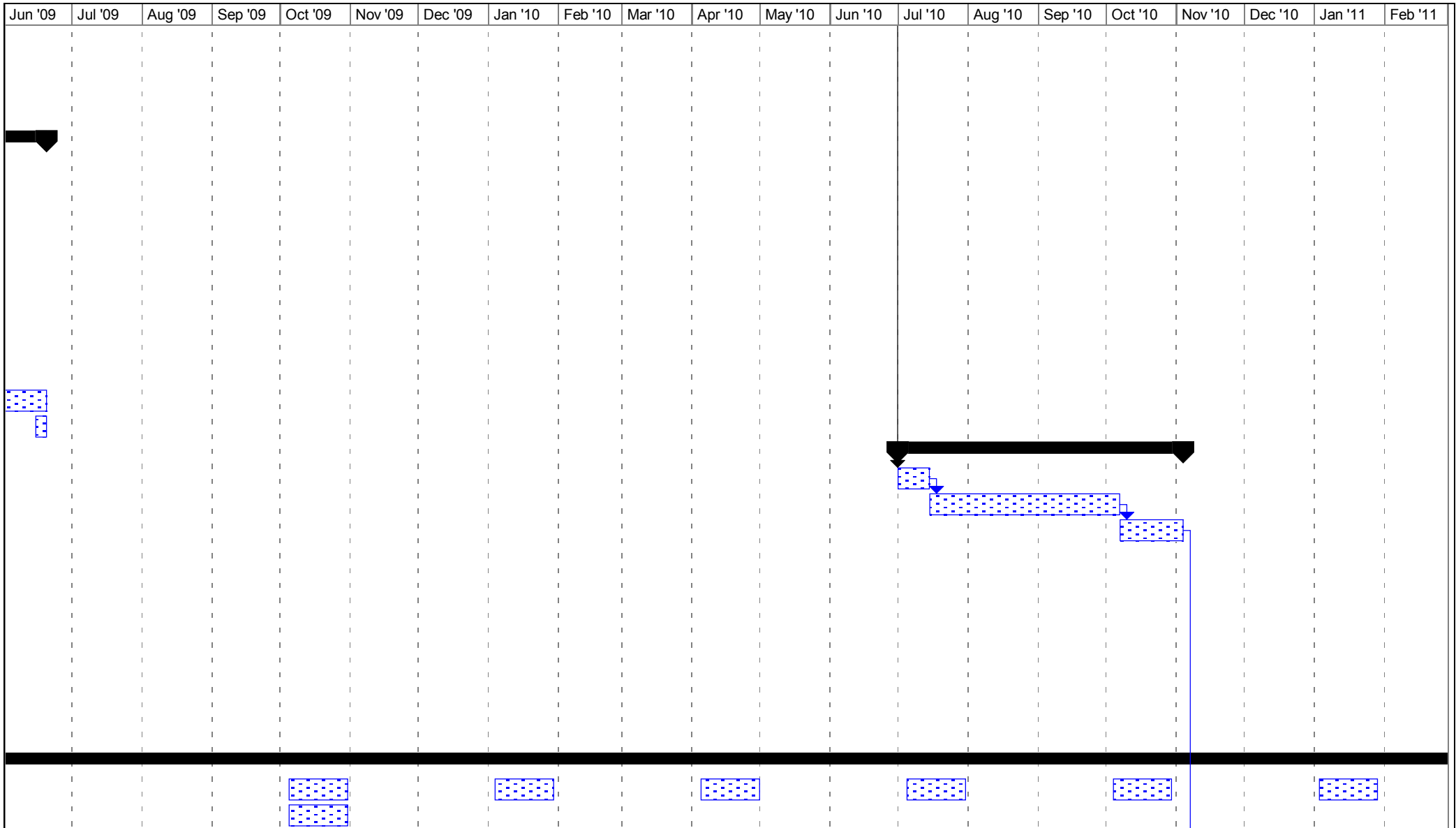



| ID | Task Name | Start | Finish | Aug '08 | Sep '08 | Oct '08 | Nov '08 | Dec '08 | Jan '09 | Feb '09 | Mar '09 | Apr '09 | May '09 |
|----|---|---------------------|---------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| 63 | Archive Packing Programme 2 | Mon 04/01/10 | Fri 29/01/10 | | | | | | | | | | |
| 64 | Archive Packing Programme 3 | Mon 05/04/10 | Fri 30/04/10 | | | | | | | | | | |
| 65 | Archive Packing Programme 4 | Mon 05/07/10 | Fri 30/07/10 | | | | | | | | | | |
| 66 | Archive Packing Programme 5 | Mon 04/10/10 | Fri 29/10/10 | | | | | | | | | | |
| 67 | Archive Packing Programme 6 | Mon 03/01/11 | Fri 28/01/11 | | | | | | | | | | |
| 68 | Archive Packing Programme 7 | Mon 04/04/11 | Fri 29/04/11 | | | | | | | | | | |
| 69 | Archive Packing Programme 8 | Mon 04/07/11 | Fri 29/07/11 | | | | | | | | | | |
| 70 | Heritage Portal phase 1 | Thu 01/10/09 | Wed 31/03/10 | | | | | | | | | | |
| 71 | Digitisation of archive materials | Thu 01/04/10 | Wed 30/06/10 | | | | | | | | | | |
| 72 | Production of museum and archive curriculum materials | Mon 02/08/10 | Tue 31/08/10 | | | | | | | | | | |
| 73 | Update and translate museum guides | Mon 03/01/11 | Thu 31/03/11 | | | | | | | | | | |
| 74 | Activity 1 | Fri 01/07/11 | Fri 29/07/11 | | | | | | | | | | |
| 75 | Activity 2 | Mon 03/10/11 | Mon 31/10/11 | | | | | | | | | | |
| 76 | Temporary exhibitions | Fri 01/07/11 | Fri 29/07/11 | | | | | | | | | | |
| 77 | Temporary exhibitions | Tue 01/11/11 | Wed 30/11/11 | | | | | | | | | | |
| 78 | Banner Conservation | Thu 01/10/09 | Fri 31/12/10 | | | | | | | | | | |
| 79 | Initial Assessment | Thu 01/10/09 | Thu 31/12/09 | | | | | | | | | | |
| 80 | Conservation work | Fri 01/01/10 | Fri 31/12/10 | | | | | | | | | | |
| 81 | Conservation of artifacts and documents | Thu 01/10/09 | Thu 30/09/10 | | | | | | | | | | |
| 82 | Marketing and publications | Wed 01/10/08 | Mon 31/10/11 | | | | | | | | | | |
| 83 | Opening | Mon 08/11/10 | Mon 08/11/10 | | | | | | | | | | |

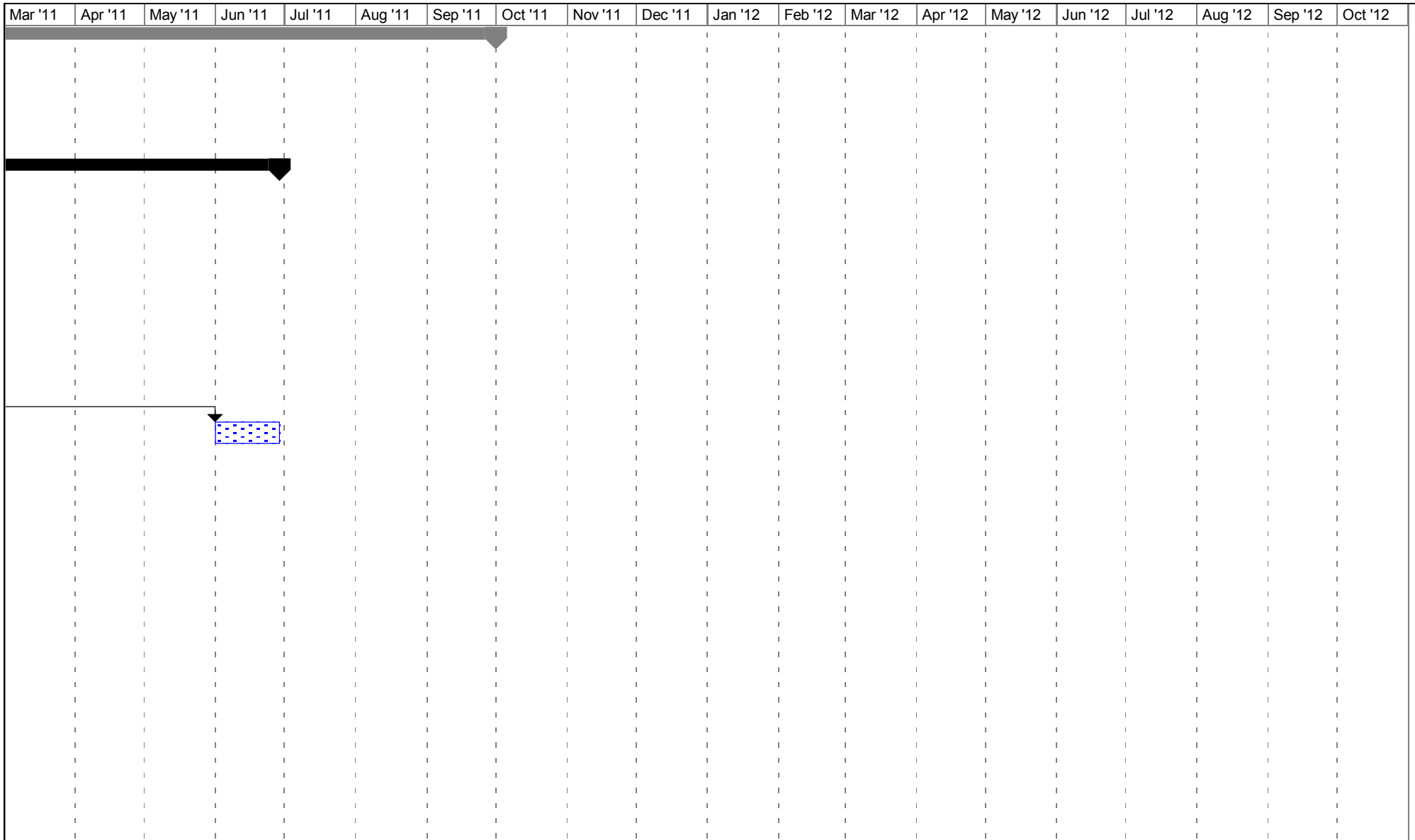
| | | | | | | |
|---|----------|---|-----------------|---|--------------------|---|
| Project: Co-operative Heritage Estimate Date: Wed 02/04/08 | Task |  | Milestone |  | External Tasks |  |
| | Split |  | Summary |  | External Milestone |  |
| | Progress |  | Project Summary |  | Deadline |  |



| | | | | | | |
|---|----------|--|-----------------|--|--------------------|--|
| Project: Co-operative Heritage Estimate Date: Wed 02/04/08 | Task | | Milestone | | External Tasks | |
| | Split | | Summary | | External Milestone | |
| | Progress | | Project Summary | | Deadline | |

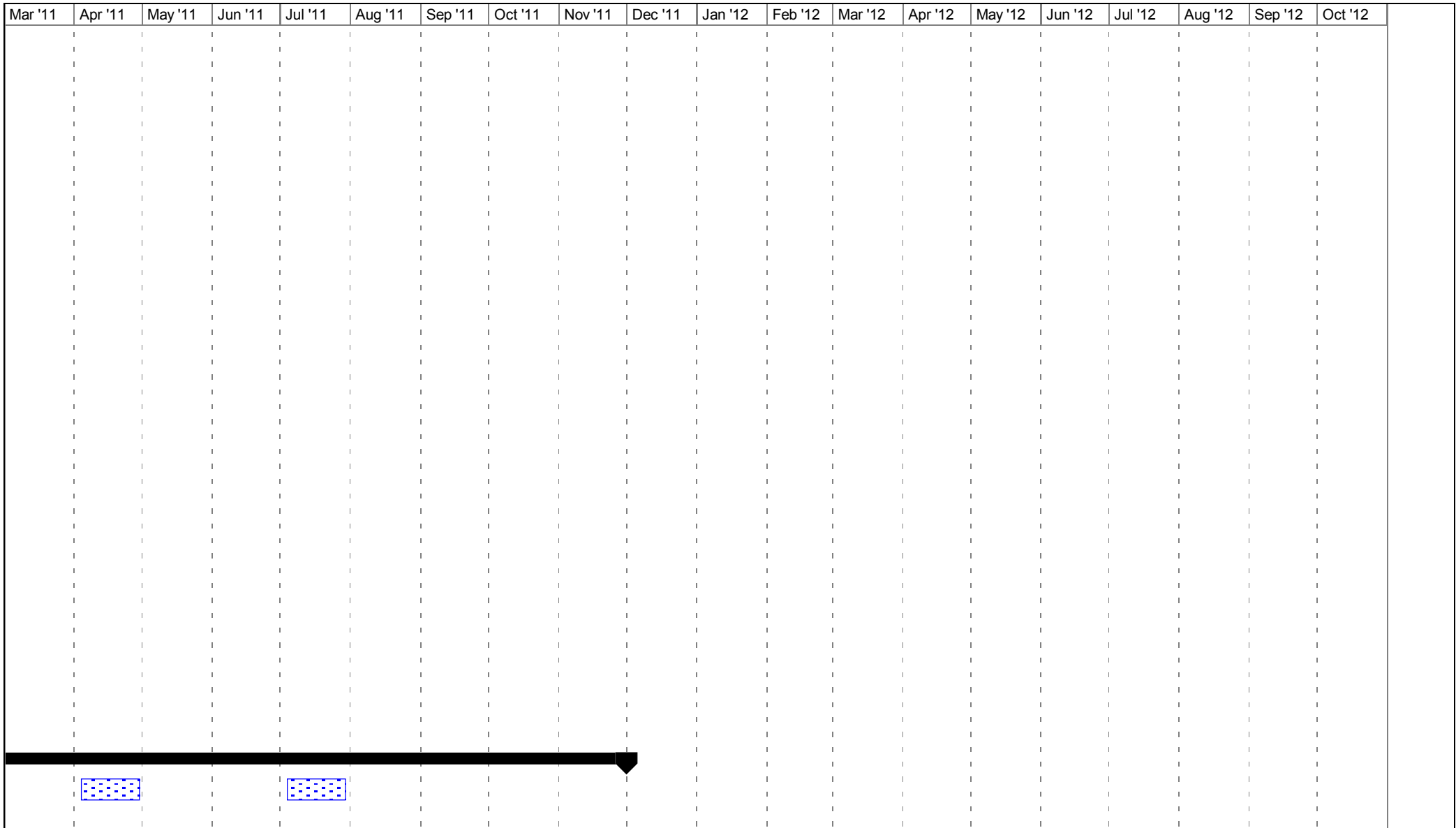


| | | | |
|---|--|---|--|
| Project: Co-operative Heritage Estimate Date: Wed 02/04/08 | Task  | Milestone  | External Tasks  |
| | Split  | Summary  | External Milestone  |
| | Progress  | Project Summary  | Deadline  |



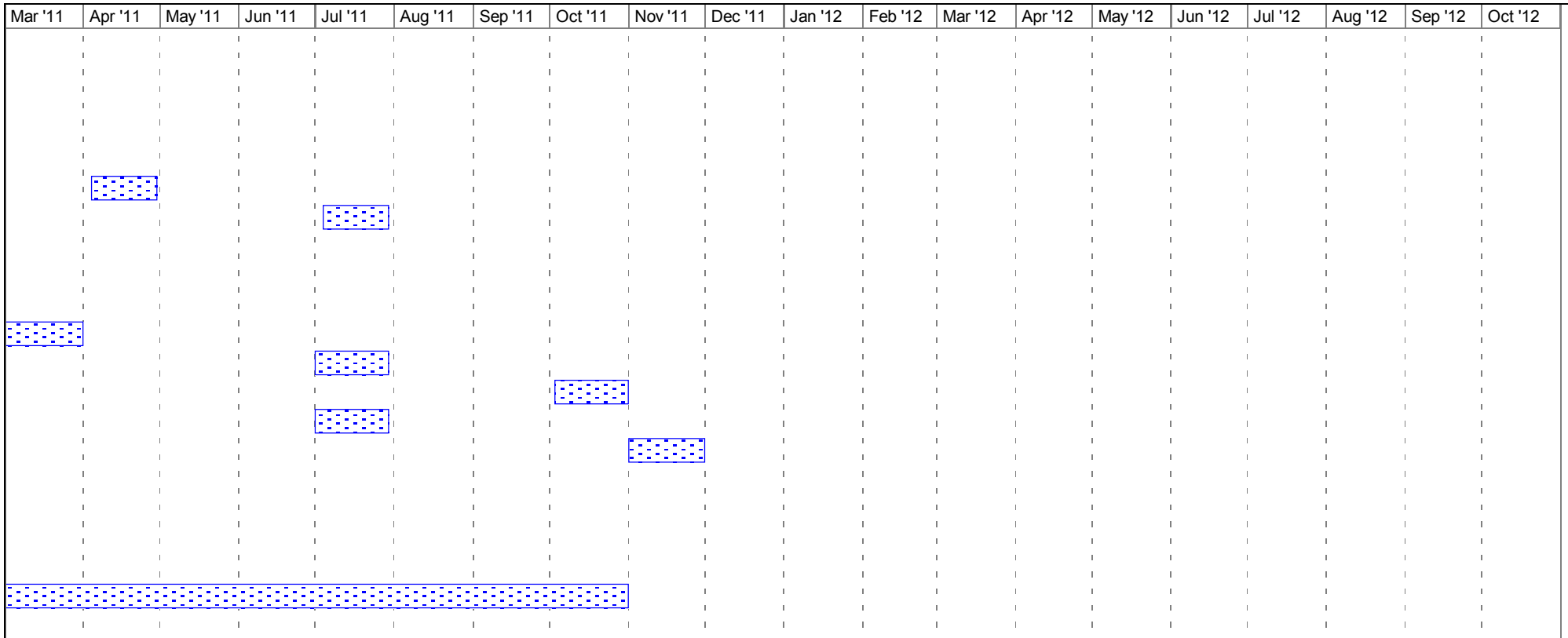
Project: Co-operative Heritage Estimate
 Date: Wed 02/04/08

| | | | | | |
|----------|--|-----------------|--|--------------------|--|
| Task | | Milestone | | External Tasks | |
| Split | | Summary | | External Milestone | |
| Progress | | Project Summary | | Deadline | |












Project: Co-operative Heritage Estimate
 Date: Wed 02/04/08

| | | | | | |
|----------|--|-----------------|--|--------------------|--|
| Task | | Milestone | | External Tasks | |
| Split | | Summary | | External Milestone | |
| Progress | | Project Summary | | Deadline | |



Project: Co-operative Heritage Estimate
 Date: Wed 02/04/08

| | | | | | |
|----------|---|-----------------|---|--------------------|---|
| Task |  | Milestone |  | External Tasks |  |
| Split |  | Summary |  | External Milestone |  |
| Progress |  | Project Summary |  | Deadline |  |

Appendix B - Annual Budget for Co-operative Heritage Trust as approved by Trustees

| | Year 1 | Year 2 | Year 3 | Total |
|--|----------------|----------------|----------------|----------------|
| Staffing | | | | |
| Learning Resources Manager & Archivist | 39,335 | 40,832 | 42,491 | 122,658 |
| Assistant Archivist | 26,379 | 27,425 | 28,548 | 82,352 |
| Assistant Archivist 2 | 26,379 | 27,425 | 28,548 | 82,352 |
| Museum Warden 1 | 7,956 | 8,289 | 8,647 | 24,892 |
| Museum Warden 2 | 7,956 | 8,289 | 8,647 | 24,892 |
| Museum Warden 3 | 8,150 | 8,491 | 8,856 | 25,497 |
| Administrator (0.5 FTE) | | 6,982 | 7,288 | 14,270 |
| Total Staffing | 116,155 | 120,751 | 125,736 | 362,643 |
| Premises Costs | | | | |
| Rent | 6,954 | 7,060 | 7,165 | 21,179 |
| Services Charges | 1,899 | 2,005 | 2,110 | 6,014 |
| Rates | 598 | 628 | 659 | 1,884 |
| Telephones | 1,245 | 1,245 | 1,245 | 3,735 |
| Insurance | 1,296 | 1,361 | 1,429 | 4,086 |
| Museum Electricity | 2,800 | 3,000 | 3,200 | 9,000 |
| Response Maintenance | 2,000 | 2,000 | 2,000 | 6,000 |
| Museum Water & Sewerage | 600 | 650 | 700 | 1,950 |
| Contingency | 5,000 | 5,000 | 5,000 | 15,000 |
| Total Premises Costs | 22,392 | 22,947 | 23,508 | 68,847 |
| Travel & subsistence | | | | |
| Car mileage | 200 | 200 | 200 | 600 |
| Other travel costs | 525 | 525 | 525 | 1,575 |
| Hospitality | 660 | 660 | 660 | 1,980 |
| Total Other Costs | 1,385 | 1,385 | 1,385 | 4,155 |
| Other Costs | | | | |
| Stationery, print & postage | 2,000 | 2,000 | 2,000 | 6,000 |
| Archive Packing materials | 2,000 | 5,000 | 5,000 | 12,000 |
| Financial Management Fee | 4,875 | 5,070 | 5,273 | 15,217 |
| Audit Fees | 2,000 | 2,100 | 2,205 | 6,305 |
| Governance | 3,058 | 3,180 | 3,307 | 9,544 |
| Depreciation | 3,010 | 3,010 | 3,010 | 9,030 |
| Subscriptions to professional bodies | 338 | 500 | 500 | 1,338 |
| Events / Activities | 2,500 | 2,500 | 2,500 | 7,500 |
| Publication of papers | 2,000 | 2,000 | 2,000 | 6,000 |
| Marketing | 650 | 5,000 | 10,000 | 15,650 |
| Subscriptions to publications | 100 | 100 | 100 | 300 |
| Acquisitions | 5,000 | 5,000 | 5,000 | 15,000 |
| Total Other Costs | 27,530 | 35,460 | 40,895 | 103,885 |
| Total Costs | 167,462 | 180,543 | 191,524 | 539,529 |

This budget is review annually and approved for 3 years

Assumptions:

1. Staffing – year on year increase 4%, does not include any grade rises
2. Rent – increases by £0.25 per annum
3. Rates – increase by 5% year on year
4. Insurance – increase by 5% year on year
5. Financial Management Fee – increase 4% year on year
6. Governance – increase 4% year on year

Appendix C – Breakdown of Project Costs

| | Cost £ | VAT £ | Total £ |
|--|------------------|----------------|------------------|
| - | | | |
| Rochdale Pioneers Museum | | | |
| Museum Design | 299,342 | 52,385 | 351,727 |
| Estimated Construction costs | 636,372 | 111,365 | 747,737 |
| Contingency plus inflation to Q4 2008 | 99,627 | 17,435 | 117,061 |
| Architectural Fees @ 10.2% | 75,072 | 13,138 | 88,209 |
| Estimated fee for other consultants @ 9.02% | 66,400 | 11,620 | 78,020 |
| Estimated planning Fees | 600 | - | 600 |
| Estimated building control fees | 3,000 | - | 3,000 |
| Insurances | 5,000 | 875 | 5,875 |
| Ground condition survey | 10,000 | 1,750 | 11,750 |
| Reception area | 10,000 | 1,750 | 11,750 |
| Equipment for education area | 5,000 | 875 | 5,875 |
| | 1,210,412 | 211,192 | 1,421,604 |
| National Co-operative Archive | | | |
| Archive Packaging Programme | 24,000 | 4,200 | 28,200 |
| Digitisation | 28,963 | 5,069 | 34,032 |
| | 52,963 | 9,269 | 62,232 |
| Education | | | |
| Heritage portal phase 1 | 27,000 | 4,725 | 31,725 |
| Archive curriculum project - production of materials | 45,000 | 7,875 | 52,875 |
| Museum curriculum project - production of materials | 45,000 | 7,875 | 52,875 |
| Update / translate museum guides | 20,035 | 3,506 | 23,541 |
| Activities | 15,000 | 2,625 | 17,625 |
| Temporary exhibitions | 25,000 | 4,375 | 29,375 |
| | 177,035 | 30,981 | 208,016 |
| Staffing | | | |
| New Staff | | | |
| Recruitment | 2,500 | 438 | 2,938 |
| Education Officer (primary) 0.5 FTE | 38,028 | - | 38,028 |
| Education Officer (secondary) 0.5 FTE | 38,028 | - | 38,028 |
| Education Officer (secondary) 0.5 FTE | 38,028 | - | 38,028 |
| Project Officer 0.5 FTE | 54,363 | - | 54,363 |
| Cover | 15,500 | - | 15,500 |
| Current Staff | | | |
| Assistant Archivists (0.2 FTE) | 33,015 | - | 33,015 |
| Learning Resources Manager & Archivist (0.2 FTE) | 25,477 | - | 25,477 |
| HFCS (0.25 FTE) | 39,302 | - | 39,302 |
| Admin support | 14,270 | - | 14,270 |
| Chief Executive & Principal | 33,484 | - | 33,484 |
| Training budget | 15,000 | - | 15,000 |
| | 346,994 | 438 | 347,431 |
| Other | | | |
| Banner Conservation | | | |
| Assessment | 18,900 | 3,308 | 22,208 |
| Conservation work | 85,750 | 15,006 | 100,756 |
| Conservation of artifacts and documents | 100,100 | - | 100,100 |
| Marketing (HLF) / Publications | 49,300 | 8,628 | 57,928 |
| | 254,050 | 26,941 | 280,991 |
| Total | 2,041,454 | 278,821 | 2,320,275 |

Calculation of Costs

Rochdale Pioneers Museum

All costs relating to this have been provided by the consultants

National Co-operative Archive

The figures for the Digitisation suite have been taken from the ICT Strategy document.

The amount for the Archive materials is based on our specialist knowledge in this area and the collections we aim to repackage during the lifetime of the project.

Education & Access

The figure for the Heritage Portal phase 1 is taken from the ICT strategy report.

The figures for the production of materials with regard to both the museum and archive curriculum projects are based on the Colleges previous experience of producing educational materials.

Staffing

New Staff

The calculation of costs is based on appropriate salary levels for the post including the on costs such as employers' pension contribution, national insurance etc.

Current Staff

These are based on current salary levels for the staff involved including all on costs.

Conservation

The calculation of these figures is based on information provided by specialist in this area and the Colleges priorities for this.

Phased Costs 2009 – Stage 1 (till M12), Stage 2 (M13 onwards)

| <u>Relevant stage / cost item</u> | 2009 | | | | | | | | | | | |
|--|-------|-------|--------|--------|-------|-------|-------|--------|-------|--------|--------|--------|
| | M4 | M5 | M6 | M7 | M8 | M9 | M10 | M11 | M12 | M13 | M14 | M15 |
| Building Costs | | | | | | | | | | | | |
| Construction costs (inc. contingencies) | | | | 9,546 | | | | | | 54,092 | 95,456 | 79,547 |
| Architects fees | 3,003 | 3,003 | 3,003 | 26,651 | | | | 7,507 | | 11,261 | 1,877 | 1,877 |
| Consultants fees | | | 13,280 | 8,300 | | | | 13,280 | | 3,320 | 1,660 | 1,660 |
| Planning fee | | | | | | | | | | | | |
| Building regulations fee | | | 3,000 | | | | | | | | | |
| Insurances (for existing buildings) | | | | | | | | | | 5,000 | | |
| Ground condition survey | | | | | | | | | | | | |
| Reception | | | | | | | | | | | | |
| Equipment for education area | | | | | | | | | | | | |
| National Co-operative Archive | | | | | | | | | | | | |
| Archive Packaging Programme | | | | | | | | | | 3,000 | | |
| Digitisation | | | | | | | | | | | | |
| Education | | | | | | | | | | | | |
| Heritage portal phase 1 | | | | | | | | | | 6,167 | 4,167 | 4,167 |
| Archive curriculum project - production of materials | | | | | | | | | | | | |
| Museum curriculum project - production of materials | | | | | | | | | | | | |
| Update / translate museum guides | | | | | | | | | | | | |
| Activities | | | | | | | | | | | | |
| Temporary exhibitions | | | | | | | | | | | | |
| Museum Design Costs | | | | | | | | | | | | |
| Cost of exhibition media (inc contingency) | | | | | | | | | | | | |
| Preliminaries - interpretative works | | | | | | | | | | 1,614 | 1,614 | 1,614 |
| Installation | | | | | | | | | | | | |
| Design fee and expenses | 1,618 | 1,618 | 1,618 | 1,618 | 1,618 | 1,618 | 1,618 | 1,618 | 1,618 | 1,618 | 1,618 | 1,618 |
| Staffing | | | | | | | | | | | | |
| Recruitment | | | | | | | | | | 2,500 | | |
| Education Officer (primary) 0.5 FTE | | | | | | | | | | | | |

| | | | | | | | | | | | | |
|--|--------------|--------------|---------------|---------------|--------------|--------------|--------------|---------------|--------------|----------------|----------------|----------------|
| Education Officer (secondary) 0.5 FTE | | | | | | | | | | | | |
| Education Officer (secondary) 0.5 FTE | | | | | | | | | | | | |
| Project Office 0.5 FTE | | | | | | | | | | | | |
| Cover | | | | | | | | | | 3,875 | | |
| Assistant Archivists (0.2 FTE) | 703 | 703 | 703 | 703 | 703 | 703 | 703 | 703 | 703 | 703 | 703 | 703 |
| Learning Resources Manager & Archivist (0.2 FTE) | 536 | 536 | 536 | 536 | 536 | 536 | 536 | 536 | 536 | 536 | 536 | 536 |
| HFCS (0.25 FTE) | 838 | 838 | 838 | 838 | 838 | 838 | 838 | 838 | 838 | 838 | 838 | 838 |
| Admin Support | 408 | 408 | 408 | 408 | 408 | 408 | 408 | 408 | 408 | 408 | 408 | 408 |
| Chief Executive & Principal | 714 | 714 | 714 | 714 | 714 | 714 | 714 | 714 | 714 | 714 | 714 | 714 |
| Training Budget | | | | | | | | | | 625 | 625 | 625 |
| Other | | | | | | | | | | | | |
| Banner Conservation | | | | | | | | | | | | |
| Assessment | | | | | | | | | | 6,300 | 6,300 | 6,300 |
| Conservation work | | | | | | | | | | | | |
| Conservation of artifacts and documents | | | | | | | | | | 8,342 | 8,342 | 8,342 |
| Marketing & publications | 913 | 913 | 913 | 913 | 913 | 913 | 913 | 913 | 913 | 913 | 913 | 913 |
| | 8,733 | 8,733 | 25,013 | 50,227 | 5,730 | 5,730 | 5,730 | 26,517 | 5,730 | 111,825 | 125,770 | 109,861 |

Phased Costs 2010 – Stage 2

| Relevant stage / cost item | 2010 | | | | | | | | | | | |
|--|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|-------|-------|
| | M16 | M17 | M18 | M19 | M20 | M21 | M22 | M23 | M24 | M25 | M26 | M27 |
| Building Costs | | | | | | | | | | | | |
| Construction costs (inc. contingencies) | 80,242 | 80,242 | 80,242 | 80,242 | 80,242 | 63,637 | | | | | | |
| Architects fees | 1,877 | 1,877 | 1,877 | 1,877 | 1,877 | 1,877 | | | | | | |
| Consultants fees | 1,660 | 1,660 | 1,660 | 1,660 | 1,660 | 1,660 | | | | | | |
| Planning fee | | | | | | | | | | | | |
| Building regulations fee | | | | | | | | | | | | |
| Insurances (for existing buildings) | | | | | | | | | | | | |
| Ground condition survey | | | | | | | | | | | | |
| Reception | | | | | | 10,000 | | | | | | |
| Equipment for education area | | | | | | 5,000 | | | | | | |
| National Co-operative Archive | | | | | | | | | | | | |
| Archive Packaging Programme | 3,000 | | | 3,000 | | | 3,000 | | | 3,000 | | |
| Digitisation | | | | 9,654 | 9,654 | 9,654 | | | | | | |
| Education | | | | | | | | | | | | |
| Heritage portal phase 1 | 4,167 | 4,167 | 4,167 | | | | | | | | | |
| Archive curriculum project - production of materials | | | | | | | | 45,000 | | | | |
| Museum curriculum project - production of materials | | | | | | | | 45,000 | | | | |
| Update / translate museum guides | | | | | | | | | | | | |
| Activities | | | | | | | | | | | | |
| Temporary exhibitions | | | | | | | | | | | | |
| Museum Design Costs | | | | | | | | | | | | |
| Cost of exhibition media (inc contingency) | | | | | | | 64,570 | 64,570 | 64,570 | | | |
| Preliminaries - interpretative works | 1,614 | 1,614 | 1,614 | 1,614 | 1,614 | 1,614 | | | | | | |
| Installation | | | | | | | | | | 31,236 | | |
| Design fee and expenses | 1,618 | 1,618 | 1,618 | 1,618 | 1,618 | 1,618 | 1,618 | 1,618 | 1,618 | 1,618 | 1,618 | 1,618 |

Staffing

Recruitment

| | | | | | | | | | | | | | |
|--|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Education Officer (primary) 0.5 FTE | 1,521 | 1,521 | 1,521 | 1,521 | 1,521 | 1,521 | 1,521 | 1,584 | 1,584 | 1,584 | 1,584 | 1,584 | 1,584 |
| Education Officer (secondary) 0.5 FTE | 1,521 | 1,521 | 1,521 | 1,521 | 1,521 | 1,521 | 1,521 | 1,584 | 1,584 | 1,584 | 1,584 | 1,584 | 1,584 |
| Education Officer (secondary) 0.5 FTE | 1,521 | 1,521 | 1,521 | 1,521 | 1,521 | 1,521 | 1,521 | 1,584 | 1,584 | 1,584 | 1,584 | 1,584 | 1,584 |
| Project Office 0.5 FTE | 2,309 | 2,309 | 2,309 | 2,309 | 2,309 | 2,309 | 2,309 | 2,404 | 2,404 | 2,404 | 2,404 | 2,404 | 2,404 |
| Cover | 3,875 | | | 3,875 | | | | 3,875 | | | | | |
| Assistant Archivists (0.2 FTE) | 936 | 936 | 936 | 936 | 936 | 936 | 936 | 975 | 975 | 975 | 975 | 975 | 975 |
| Learning Resources Manager & Archivist (0.2 FTE) | 737 | 737 | 737 | 737 | 737 | 737 | 737 | 769 | 769 | 769 | 769 | 769 | 769 |
| HFCS (0.25 FTE) | 1,114 | 1,114 | 1,114 | 1,114 | 1,114 | 1,114 | 1,114 | 1,160 | 1,160 | 1,160 | 1,160 | 1,160 | 1,160 |
| Admin Support | 408 | 408 | 408 | 408 | 408 | 408 | 408 | 408 | 408 | 408 | 408 | 408 | 408 |
| Chief Executive & Principal | 949 | 949 | 949 | 949 | 949 | 949 | 949 | 989 | 989 | 989 | 989 | 989 | 989 |
| Training Budget | 625 | 625 | 625 | 625 | 625 | 625 | 625 | 625 | 625 | 625 | 625 | 625 | 625 |

Other

Banner Conservation

| | | | | | | | | | | | | | |
|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Assessment | | | | | | | | | | | | | |
| Conservation work | 7,146 | 7,146 | 7,146 | 7,146 | 7,146 | 7,146 | 7,146 | 7,146 | 7,146 | 7,146 | 7,146 | 7,146 | 7,146 |
| Conservation of artifacts and documents | 8,342 | 8,342 | 8,342 | 8,342 | 8,342 | 8,342 | 8,342 | 8,342 | 8,342 | 8,342 | | | |
| Marketing & publications | 913 | 913 | 913 | 913 | 913 | 913 | 913 | 913 | 913 | 913 | 913 | 913 | 913 |

| | | | | | | | | | | | |
|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|---------------|---------------|---------------|---------------|
| 126,093 | 119,218 | 119,218 | 131,581 | 124,706 | 123,101 | 101,545 | 184,670 | 94,670 | 55,994 | 21,759 | 21,759 |
|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|---------------|---------------|---------------|---------------|

Phased Costs 2010 – Stage 2

| <u>Relevant stage / cost item</u> | 2011 | | | | | | | | | | | | TOTAL exc. VAT |
|--|-------|-------|-------|--------|-------|-------|--------|-------|-------|--------|--------|-----|-------------------|
| | M28 | M29 | M30 | M31 | M32 | M33 | M34 | M35 | M36 | M37 | M38 | M39 | |
| Building Costs | | | | | | | | | | | | | |
| Construction costs (inc. contingencies) | | | | 32,510 | | | | | | | | | 735,998 |
| Architects fees | | | | 1,874 | | | | | | | | | 75,072 |
| Consultants fees | | | | 1,660 | | | | | | | | | 66,400 |
| Planning fee | | | | | | | | | | | | | 600 |
| Building regulations fee | | | | | | | | | | | | | 3,000 |
| Insurances (for existing buildings) | | | | | | | | | | | | | 5,000 |
| Ground condition survey | | | | | | | | | | | | | 10,000 |
| Reception | | | | | | | | | | | | | 10,000 |
| Equipment for education area | | | | | | | | | | | | | 5,000 |
| National Co-operative Archive | | | | | | | | | | | | | |
| Archive Packaging Programme | 3,000 | | | 3,000 | | | 3,000 | | | | | | 24,000 |
| Digitisation | | | | | | | | | | | | | 28,963 |
| Education | | | | | | | | | | | | | |
| Heritage portal phase 1 | | | | | | | | | | | | | 27,000 |
| Archive curriculum project - production of materials | | | | | | | | | | | | | 45,000 |
| Museum curriculum project - production of materials | | | | | | | | | | | | | 45,000 |
| Update / translate museum guides | 6,678 | 6,678 | 6,678 | | | | | | | | | | 20,035 |
| Activities | | | | | | | 5,000 | | | 10,000 | | | 15,000 |
| Temporary exhibitions | | | | | | | 12,500 | | | | 12,500 | | 25,000 |
| Museum Design Costs | | | | | | | | | | | | | |
| Cost of exhibition media (inc contingency) | | | | | | | | | | | | | 193,710 |
| Preliminaries - interpretative works | | | | | | | | | | | | | 14,528 |
| Installation | | | | | | | | | | | | | 31,236 |
| Design fee and expenses | 1,618 | 1,618 | 1,618 | 1,618 | 1,618 | 1,618 | 1,618 | 1,618 | 1,618 | 1,618 | | | 59,868 |
| Staffing | | | | | | | | | | | | | |

| | | | | | | | | | | | | | |
|--|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------------|
| Recruitment | | | | | | | | | | | | | 2,500 |
| Education Officer (primary) 0.5 FTE | 1,584 | 1,584 | 1,584 | 1,584 | 1,584 | 1,584 | 1,649 | 1,649 | 1,649 | 1,649 | 1,649 | 1,649 | 38,028 |
| Education Officer (secondary) 0.5 FTE | 1,584 | 1,584 | 1,584 | 1,584 | 1,584 | 1,584 | 1,649 | 1,649 | 1,649 | 1,649 | 1,649 | 1,649 | 38,028 |
| Education Officer (secondary) 0.5 FTE | 1,584 | 1,584 | 1,584 | 1,584 | 1,584 | 1,584 | 1,649 | 1,649 | 1,649 | 1,649 | 1,649 | 1,649 | 38,028 |
| Project Office 0.5 FTE | 2,130 | 2,130 | 2,130 | 2,130 | 2,130 | 2,130 | 2,218 | 2,218 | 2,218 | 2,218 | 2,218 | 2,218 | 54,363 |
| Cover | | | | | | | | | | | | | 15,500 |
| Assistant Archivists (0.2 FTE) | 936 | 936 | 936 | 936 | 936 | 898 | 975 | 936 | 936 | 936 | 936 | 936 | 33,015 |
| Learning Resources Manager & Archivist (0.2 FTE) | 737 | 737 | 737 | 737 | 737 | 707 | 769 | 737 | 737 | 737 | 737 | 737 | 25,476 |
| HFCS (0.25 FTE) | 1,114 | 1,114 | 1,114 | 1,114 | 1,114 | 1,069 | 1,160 | 1,114 | 1,114 | 1,114 | 1,114 | 1,114 | 39,301 |
| Admin Support | 408 | 408 | 408 | 408 | 408 | 408 | 408 | 408 | | | | | 14,270 |
| Chief Executive & Principal | 949 | 949 | 949 | 949 | 949 | 911 | 989 | 949 | 949 | 949 | 949 | 949 | 33,484 |
| Training Budget | 625 | 625 | 625 | 625 | 625 | 625 | 625 | 625 | 625 | | | | 15,000 |
| Other | | | | | | | | | | | | | |
| Banner Conservation | | | | | | | | | | | | | |
| Assessment | | | | | | | | | | | | | 18,900 |
| Conservation work | | | | | | | | | | | | | 85,750 |
| Conservation of artifacts and documents | | | | | | | | | | | | | 100,100 |
| Marketing & publications | 2,465 | 2,465 | 2,465 | 2,465 | 2,465 | 2,465 | 2,465 | 2,465 | 2,465 | 2,465 | | | 49,300 |
| | 25,412 | 22,412 | 22,412 | 54,777 | 15,733 | 15,581 | 36,676 | 16,017 | 15,610 | 24,985 | 23,402 | 10,902 | 2,041,454 |