

SOUTH WEST HERITAGE TRUST

MOVING FORWARD

A Strategy for 2020 to 2025



1. Setting the Scene

In a world challenged by climate change, pandemic disease and deep social and economic uncertainties, the South West Heritage Trust believes that it is nevertheless well placed to make an impact for the benefit of people and communities. It is determined that it should do so.

Our services are for everyone and we want to reach as many people as we can. We also want to make sure that our heritage – represented by collections, buildings, landscapes, archaeology and foundational stories – is excellently cared for and made powerful in many different ways. We know there is much that the Trust has yet to do in realising the full potential of its role, in striving for excellence and in continuing to build its reputation and profile in Devon, Somerset and beyond. This strategy sets out the principles that will shape our endeavour in the five years that lie ahead.

We've listened to many individuals, communities, organisations and funders in creating the strategy and we've sought to respond to the wide range of aspirations and ideas that we've heard. At the same time we've also sought to remain true to the vision that has guided us from the start – that we should celebrate and protect the rich heritage of Devon and Somerset, helping everyone to enjoy it now and in the future.

Devon and Somerset – a remarkable heritage in a uniquely rural setting

Devon and Somerset are home to some of the nation's most important historic sites and heritage stories. In fulfilling the privilege and responsibility of our heritage role, we seek always to respond flexibly and imaginatively to the special character and geography of the two counties.

Devon has some densely-populated areas but the county overall is among the most rural places in England. Somerset is in the lowest 25% nationally in terms of population density.

The landscape we cover is also vast, amounting to a remarkable 8.3% of the total area of England.

2. Who We Are

The South West Heritage Trust was created in 2014 as an independent charity and limited company dedicated to preserving and promoting the heritage of Devon and Somerset. We work with many partners, including two County Councils, Arts Council England and the National Lottery Heritage Fund, to deliver important and wide-ranging heritage services. We reach thousands of people every year.

Through our **Museums Service** we run three Accredited Museums – the Museum of Somerset and Somerset Military Museum in Taunton and Somerset Rural Life Museum in Glastonbury. We manage the Brick and Tile Museum in Bridgwater and provide curatorial support to Weston-Super-Mare's revitalised museum. Three million museum objects, ranging from

outstanding geological, Iron Age and Roman collections to textiles and fine art, tell the remarkable story of Somerset and the South West.

We are the major custodians of written evidence about Devon and Somerset. Our Accredited **Archive and Local Studies Services** have centres in Taunton, Exeter and Barnstaple where we care for over 10 million archives dating from the 8th century to the present day. 200,000 printed reference works about the South West are held in the Local Studies collections. We also run the archive services on behalf of the unitary authorities of North Somerset and Torbay. Online access is being transformed through enhanced catalogues and indexes, and thousands of people use our digitised resources. We are taking a lead nationally in preserving digital archives and making them available.

Our **Historic Environment and Estates Service** supports local authorities, partners and the public by offering planning-related advice and information about Somerset's archaeology and built heritage. We also provide services to Bath & North East Somerset Council. We are a Registered Archaeological Organisation and are responsible for over 400 acres of historic landscapes, including Cothelstone Hill in the Quantock Hills and Deer Leap in the Mendips.

Our **Learning Service** provides opportunities for people of all ages, including those with learning disabilities or affected by dementia. Over 10,000 children participate each year in workshops for Key Stages 1 and 2. We make authentic heritage objects available to schools for use in the classroom. Partnership projects to enhance learning take place with secondary schools and further and higher education institutions.

Our organisational culture is one of working together as a single trust to provide a diversity of heritage services. To achieve this aim we rely on our amazing staff and depend fundamentally on our wonderful volunteers, our Friends organisations, our Supporters and partners, and all those who champion our work. Our services are funded by core grants from Devon and Somerset County Councils, by a wide range of contracts and by commercial activity. We also raise new income and attract grant investment from generous funders.

3. Wider Benefits

3.1 Social Benefits

Our services are major contributors to personal wellbeing and a sense of place. We want our services to be accessible, to address issues of diversity and to promote and enable equality of opportunity for everyone.

Our large community of knowledgeable and dedicated volunteers are crucial to what we do. Volunteering also contributes directly to people's physical, emotional and mental wellbeing. We seek to ensure that volunteering takes place in an environment which is inclusive and which supports and respects the needs of individuals.

Experiencing heritage enhances wellbeing and brings people together, whether through learning activities for children, access to inspirational art and exhibitions, the discovery of family or community history, dementia-friendly reminiscence sessions or visiting a landscape site.

3.2 Economic Benefits

We are significant contributors to the local economy, fostering tourism, research, and the cultural and creative industries.

- Our museums are major tourist destinations in Somerset, attracting new visitors and actively promoting the county. The Museum of Somerset alone is estimated to provide £2.3 million of economic benefit to Somerset from 72,000 visits each year.
- The heritage centres in Exeter, Barnstaple and Taunton attract researchers from around the world.
- Our heritage landscape sites have many tens of thousands of visitors each year and actively contribute to individual wellbeing and the local economy.

We prioritise local services and employment to ensure that we support our local economy. We are always seeking new sources of income through the provision of commercial services and trading activities. The profits we generate are reinvested to increase the public benefit we provide.

In our first 5 years...

Visitors	More than 550,000 visitors visited one of our museums or heritage centres and over 500,000 people enjoyed our landscape sites
Events	95,000 people attended 2,791 events
Volunteers	Over 135,000 hours were given (that's 18,250 working days) by hundreds of generous volunteers
Websites	Our website and online resources had more than 4.5 million visits
Learning	Nearly 55,000 school children attended workshops and more than 40,000 people learned more about their heritage at family sessions
Archives	2,691 new archive collections were added to our holdings and more than 26,000 people were helped with their enquiries and research requests

3.3 Environmental Sustainability

We are committed to local procurement wherever possible in order to support the economy and livelihoods of people in Devon and Somerset. This also helps us to reduce our carbon footprint.

Our sites, including two Grade I listed buildings and a Victorian farmhouse, are managed carefully to ensure that their environmental footprint is minimised. Somerset Heritage Centre is an A+ rated building, optimised for energy efficiency.

The Historic Environment Service works to ensure that developers in Somerset operate ethically in relation to the county's built heritage and archaeology. The Service seeks to protect and promote the historic environment as an essential component in making communities economically and environmentally sustainable.

The Trust manages over 400 acres of historic landscape sites across Somerset which provide open-access enjoyment to the public. The sites also offset more than 25% of the total carbon emissions produced by the Trust.

We continue to seek ways to eliminate our use of single-use plastics by actively finding more sustainable options.

3.4 Challenges

The wider political, financial and cultural environment continues to be volatile, not least in the face of pandemic disease, new international trading relationships and potential changes in local government. We need to be resilient and dynamic in responding to such challenges and to absorb impacts positively. There is no fixed blueprint for ensuring our future, and robust risk management will be essential. Key considerations and issues include:

- The process of far-reaching political change in the UK and the scope and scale of associated risks which are difficult to quantify – we do not have any direct major financial dependencies which extend outside the UK, although incoming tourism may be affected.
- The impact of the Covid-19 pandemic, which is expected to have a deep and lasting effect on South West England.
- Continued heavy pressures on local government finance as levels of support received from central government are reduced – methods to manage such pressure may result in rapid changes to the local political landscape including the shifting of historic county boundaries.
- The unpredictable nature of inflation which is being influenced by global issues – significant fluctuations in energy prices, and supplies and services, and the effect on salaries, will demand careful financial management.
- Taking greater responsibility for limiting the environmental impact of our services – methods of working, procurement and the allocation of resources must maximise sustainability while remaining ambitious and developmental.
- Managing succession planning to ensure knowledge transfer and a resilient organisation for the future.

What do people want from us?

We are committed to working with a diverse range of people so that we can learn and develop in future. During the creation of this strategy we have consulted communities, stakeholders, funders and organisations and held sessions with our staff to draw ideas together. Key themes that emerged include sustainability, health and wellbeing, accessibility, and leadership. These themes have helped us shape our ideas to ensure that what we do is relevant and powerful in the time ahead.

We have, for example, been asked to identify and promote the Trust as a centre of excellence that benefits the wider heritage sector, and those wishing to engage with it, in areas including conservation, digital preservation, traineeships, apprenticeships and the provision of collections-based information.

4. Our Strategy

4.1 Focusing on outcomes

During the next five years we will fulfil our vision and mission by focusing on three major outcomes:



In achieving these outcomes we will be:

Inclusive and relevant

Our services are for everyone and will help people feel valued, respected and included. We will use our collections and heritage resources to make a difference for people of all ages and to benefit their wellbeing.

Collaborative and connected

Working with others is at the heart of how we do things. We will seek opportunities to enable rich and diverse heritage outcomes through creative partnerships of many kinds.

Sustainable and responsible

Our values and principles are expressed in the way we offer services. We will strive in all we do to be environmentally, socially and financially sustainable and responsible.

4.2 Our Vision and Mission

Focusing on our three outcomes will enable us to fulfil **the vision and mission** which has guided the Trust since it was created:

Our Vision

We will celebrate and protect our rich heritage, helping everyone to enjoy it now and in the future.

Our Mission

Access, Learning and Enjoyment

- We will help people from all backgrounds to learn from our heritage and be inspired by it.
- We will encourage individuals and communities to get involved in our heritage.
- We will make our heritage as accessible as we can and will promote research and understanding.
- We will provide rich heritage experiences for everyone.

Care, Conservation and Protection

- We will make sure our heritage is excellently cared for.

Resilience

- We will build partnerships with funders and stakeholders to increase sustainability.
- We will strive for excellent, ambitious and entrepreneurial services.
- We will foster links between heritage, the arts, tourism and economic prosperity for the benefit of all.

Staff and Volunteers

- We will ensure that our workforce is skilled, motivated and diverse.

4.3 What we will achieve

Supporting People and Communities

In the next five years we will:

- Reach more people throughout Devon and Somerset, enabling positive heritage experiences through outreach, open days, advisory sessions and online engagement.
- Prioritise our work with young people to ensure that heritage becomes a powerful and inspiring part of their lives both now and in the future.

- Work with diverse audiences from many backgrounds and respond to contemporary issues and themes to create a challenging and innovative public programme, founded on the diversity, character and heritage of the South West.
- Use the heritage we care for and the services we offer to support physical and mental wellbeing and to foster a strong sense of place and belonging.
- Actively engage with cultural and heritage partners in Devon and Somerset, especially at our sites in Barnstaple, Exeter, Taunton, Glastonbury, Bridgwater and Shapwick, and at our landscape sites, in order to realise the full potential of the services we provide and their importance for communities and stakeholders.
- Develop the visibility of the Trust through outreach, online content and partnership activity, ensuring that people and communities can be involved with our services in many different ways.
- Work with local, regional and national partners to ensure that heritage and the arts remain essential contributors to wellbeing and community cohesion.
- Uphold the expectations of our visitors, stakeholders and staff, using resources wisely and minimising our environmental footprint.

Protecting Our Heritage

To preserve and protect our heritage we will:

- Be excellent custodians of the heritage in our care, and add to it wisely, so that it can continue to inform, enrich and inspire.
- Seek varied and imaginative ways to provide intellectual and physical access to heritage.
- Work with funders and partners, locally, regionally and nationally, to preserve and protect heritage, including through the proper care of the historic environment.
- Use the passion and expertise of our staff and volunteers to interpret heritage in innovative ways and to tell new stories about it.
- Build our collections to ensure that they more fully represent our inheritance from the past as well as reflecting contemporary priorities and non-traditional sources.
- Use digital means to achieve more accessible services, simpler processes and increased information about heritage collections and sites.
- Continue to develop our role in digital preservation, building our expertise and developing archive and digital storage services.
- Use our sites, digital platforms, collections and resources innovatively, diversifying our financial model to facilitate growth and high-quality services.
- Advise and support other public and private organisations in the management, care and interpretation of heritage.

Making an Impact

To make an impact we will:

- Embrace opportunity and innovation and strive for excellence in order to achieve the best outcomes for our audiences.
- Work with schools and families to capture their imaginations and provide unforgettable experiences.
- Increase our understanding of existing and potential audiences through research and evaluation, providing a sound evidence base for future engagement.
- Ensure our communications and publicity materials are accessible, especially online, enabling greater inclusivity and targeted marketing campaigns.
- Be a strong voice for heritage in Devon and Somerset as a regional sectoral leader, working with businesses, charities, public sector partners, communities and collectives to ensure that heritage is at the heart of sustainable economic and cultural development.
- Increase our financial resilience by developing existing funding streams, creating new ones, and adopting innovative approaches to funding.
- Prioritise forward planning, including through an integrated approach to audience development, environmental sustainability, fundraising and enterprise.
- Give active support to staff, providing development and training opportunities, and promoting equality, so that we have the skills, knowledge and confidence to make an impact.

5. Communicating Our Progress

It's essential that we let others know what we're doing to support people and communities, to protect our heritage and to make an impact. We will communicate through written reports, but will also make engaging, effective and accessible use of our website and social media channels to tell the stories of what has been achieved. We will be active in our planned publicity and use of different media and will be in regular communication with stakeholders.

Our annual business plan and annual service plans will provide detail about our progress and intentions. They will be dynamic documents that are used throughout the year. We will undertake thorough evaluation of our work, so that we understand what people think about us and are able to adapt and develop to meet their needs. Evaluating our progress will enable us to communicate major outcomes to our many funders, stakeholders and partners.

Our formal reporting to the Charity Commission, County Councils, funders, and others will enable us to present a full summary of our progress and to provide benchmarks of our development over time. Our reporting and self-evaluation will be used to drive further development and to provide insights into what has worked well.

6. Moving Forward

This strategy sets out a direction of travel rather than a detailed plan of action and will change and develop over time to meet new social priorities. If it is to succeed we know, above all, that the Trust will need ideals and leadership that are inspirational and staff who are dedicated, optimistic and flexible, and open to the support and perspectives of many other people.

Five years is a very long time in a rapidly-changing world and the future seems more uncertain now than ever before in our lifetimes. But one thing we feel sure of – that the rich and remarkable heritage of Devon and Somerset will continue to embody for its people and communities enduring human values about identity and meaning. In that fact lies our challenge and our opportunity.

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