

**South West Heritage Trust
Annual Outcomes Report
November 2015 to October 2016
Somerset**



30 January 2017

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Supporting Documents:

- Media Reports
- Hinkley Point Archaeology Outreach Project, 2012–16. Report on Community Engagement
- Business Plan 2016–17
- South West Heritage Trust Report on Progress and Activities in Somerset: 1 November 2015–30 April 2016

Front Page Image: Excavations at the Beckery Chapel Site, Glastonbury, May 2016

Section 1. Introduction

This report covers the period of operation of the South West Heritage Trust from 1 November 2015 to 31 October 2016.

The report comprises:

- A statement of our key performance figures achieved during the year.
- A narrative report detailing the activities of the Trust. The report focuses on activities undertaken in Somerset along with organisational achievements.
- Extracts from the Business Plan indicating outlining our proposed actions in support of the Agreed Activities.
- The Trust-wide Exhibition Plan for the coming year.
- A summary of how the Trust is undertaking the Agreed Activities.
- The full list of quantitative performance indicators recorded in the year.
- The Somerset list of quantitative performance indicators recorded in the year.
- A summary of qualitative feedback.
- A summary of the key meetings undertaken during the year.
- A financial summary of the core activities of the Trust.

Section 2. Our performance in numbers (Somerset and Devon)

Key Performance Indicators – 2015 to 2016	
92,750	visitors to our sites
10,605	children attending formal learning sessions
355	formal learning sessions
7,529	people at informal learning sessions
75	informal learning sessions
715,338	visitors to our websites
3,672	days of volunteer time
27,177	volunteer hours
546	heritage events held
19,024	people attending our heritage events
34	cubic metres of archives accessioned
2,290	archive documents repaired
3,531	formal external requests for information
7	service complaints received, satisfactorily dealt with
0	service complaints received, unsatisfactorily dealt with
4.68	combined social media review (out of 5)

Section 3. Somerset Annual Outcomes Report

1 November 2015 to 31 October 2016

3.1 Somerset Museums Service

Providing curatorial and design services for five museums, the Somerset Museums Service made significant progress during the year, with the delivery of key objectives from the Business Plan:

- A popular and diverse programme of temporary exhibitions was delivered at the Museum of Somerset. (The full range of temporary exhibitions, events and activities is described later on in this report.)
- A wide-ranging process of object selection and storyline development for Weston Museum was undertaken and agreed with partners.
- The Somerset Rural Life Museum project successfully completed the main-build phase and began the installation phase.

On 21 March, at an awards ceremony at the Imperial War Museum, the **War Stories film**, made as part of the HLF-funded War Stories Project, received the Audience Vote as best film in the IWM Short Films Festival 2016. It was also runner up in the Best Use of IWM Archive Material category.

The Trust finalised the object selection and storyline development processes for the **Weston-Super-Mare Museum**, which is due to reopen in August 2017.

The **Portable Antiquities Scheme** in Somerset and Dorset continued to be successfully delivered by the Trust in partnership with the British Museum. Negotiations also began for the Trust to deliver the scheme in Devon in 2016–17.

With the help of funding from Arts Council England and South Somerset District Council, the Trust continued to manage the **Museum Development Officer** role, providing support to Somerset's many community museums.

Four of the five museums managed or supported by the Trust retained **Accreditation** under the Arts Council England scheme:

- The Museum of Somerset – accreditation number 815
- Somerset Military Museum – accreditation number 816
- Somerset Rural Life Museum – provisional accreditation number 817
- Weston Museum – provisional accreditation number 818

3.2 The Museum of Somerset

The Museum of Somerset had a year of major achievement. There were 72,085 visitors, a reduction on the previous year when, however, two very prominent exhibitions, of the Alfred Jewel and of the Lego 'Brick Wonders', very significantly boosted numbers. The museum retained its place in the top 20 most visited free attractions in the south west of England (Visit England visitor insights).

The average visitor rating out of five stars on TripAdvisor was 4.65, a very positive endorsement both of the welcome given to visitors and of the quality of the museum.

Of 176 TripAdvisor reviews, 169 rated the museum as 'good' or 'excellent'. Two reviews are typical:

"One of the Best Local Museums I Have Visited"

We've all yawned our way through local interest museums, as they are often dreary, have precious little interesting content, and are usually tiddly little places - often in a converted house. Not so The Museum of Somerset.

It's bigger than you might expect, and the exhibits are genuinely excellent, in particular the military and natural history exhibits. In fact, these 2 exhibits, alone, are probably the best I've seen, as they are truly local in content and tell a tale.

The setting is great - next to the castle, and I can also recommend the guided tours, which are only a couple of quid.

Have been back there a couple of times, as it's just so well done.

Visited September 2016

"Just lovely"

This is a truly excellent curation of all things Somerset. Staff members are knowledgeable; the exhibition design is brilliant; exhibits are myriad and qualitative. I recommend the museum to all visitors to Somerset no matter what their age or interests.

Visited May 2016

In the summer of 2015, the operation and management of **Castle House** was transferred to the Trust. As a result, the Trust year 2015–16 was the first in which all the buildings of Taunton Castle site were operated as one museum.

The museum hosted seven high profile and diverse **temporary exhibitions** in the period:

- The Becket Casket – as part of the 'Spotlight Loans' programme, the Becket Casket was on loan to the Trust from the Victoria and Albert Museum and displayed throughout February and March. A programme of associated events also took place including a collaboration with the Devon History Society. Other Somerset-based events, including a lecture by Professor Nicholas Vincent, also took place.
- Imprints – South West Textiles
- New Dimensions – contemporary art inspired by hidden objects in the museum collection
- Victor Ambrus – a selection of paintings by the highly-respected and prolific Time Team artist
- Pirates! – an external exhibition which also told the story of Somerset's own pirate, William Dampier
- Wild Art – the art of Somerset naturalists Andrew and David Neal
- Harry Frier – a selection of paintings of Taunton and its surroundings

A programme of supporting **events and activities** took place for each of the temporary exhibitions, engaging with different audiences including families and children. The museum was host to the

majority of these additional activities through our informal learning programme. Further detail is provided in the sections 'Learning' and 'Exhibitions, Events and Outreach'.

On 26 November the Museum of Somerset hosted a special occasion when **Colin Criddle**, a Second World War veteran of the Somerset Light Infantry, received the Légion d'Honneur. The Great Hall was specially decorated for the occasion with the Union Jack and a French Tricolour. (Colin Criddle was a remarkable man and a very good friend to the Museum of Somerset and Somerset Military Museum. He contributed memorably to the award-winning Wars Stories project. Colin died on 27 January 2017 at the age of 93.)

The Museum of Somerset **closed period** at the beginning of the year allowed much-needed case cleaning and redecoration to take place as well as the installation of a new lighting system in Castle House.

3.3 Castle House

Taunton Castle is a welcome addition to the properties managed by the Trust and allows the site to be presented more cohesively. The building comprises rooms on the ground floor which are open to the public as a part of the museum. They are also available for private hire by external organisations.

The upper floors are established as a **holiday let** advertised through Classic Cottages. The income raised from the holiday let was in line with the business plan projections.

3.4 Somerset Rural Life Museum

The **main-build works** for Somerset Rural Life Museum were completed early in the year and despite cost pressures, remained within budget. The site was handed back to Somerset County Council by the contractor on 31 March 2016. The Trust took formal possession on 13 July when the lease from Somerset County Council, and several related agreements, were completed. The lease runs to 2044. The public footpath through the site was reopened on 30 June.

Fit-out works and additional landscaping works being undertaken by the Trust were commenced as soon as site access was possible.

A rapid review of the **storyline process** was undertaken with external help during October and November 2015 and suggested a number of new interpretative approaches. Revised interpretative proposals were reported to the Project Board on 15 March.

Arrangements were put in place for the remaining project capital to be transferred from Somerset County Council to the Trust in order to simplify procurement of the **second phase of the project**.

An **inspection visit** by Historic England was made on 4 October to agree the proposed lighting scheme for the Abbey Barn.

The reopening of the museum is due to take place in the late spring of 2017.

3.5 Brick and Tile Museum

The Brick and Tile Museum continued to be used mainly as a centre for the Learning Disabilities Service and is much valued in that role. The museum is also a popular location for family-focused informal learning events. **Visitor numbers** increased during the year to 792.

3.6 Somerset Archives and Local Studies

The Somerset Archives and Local Studies Service continued to provide public access to the **Somerset collections** at the Somerset Heritage Centre.

The Trust won the award from the Archives and Records Association for **Record Keeping Service of the Year** following nomination by the Friends of Devon's Archives.

The **number of visits** to the Centre for research purposes was 5,181 during the year. Visitor numbers to physical archive sites have been declining nationally for a number of years and this trend is also reflected in Somerset:

2015–16	5,181
2014–15	5,636
2013–14	6,184

By comparison, the visitor numbers to online resources are increasing.

Site	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total
swheritage.org.uk	13,164	19,831	21,520	29,795	84,310
Somerset Archives	80,902	53,156	7,224	11,750	153,032

The new Somerset Archive catalogues were launched on the www.swheritage.org.uk site towards the end of March 2016 (in quarter 2). The recording of visits to the Somerset Archives site prior to this point was based on data obtained from the SCC hosted site and included 'hits' and page views combined with catalogue searches. The data from quarter 3 onwards is from the new SWHT catalogue and shows full visits to the catalogue. It is evident from the data that the number of visits is increasing.

The overall number of visits to the main www.swheritage.org.uk site is also increasing as a result of marketing and users switching their browsers to the new site.

The year saw a dramatic improvement to the provision of **online archive resources** with the launch of:

- Somerset Archive catalogue <http://somerset-cat.swheritage.org.uk/home>
- Devon Archive catalogue (containing many entries relevant to Somerset) <http://devon-cat.swheritage.org.uk/home>
- Somerset and Devon Local Studies Library (combining library catalogue information from seven separate collections) <http://library-cat.swheritage.org.uk/home>

The creation and launch of these catalogues has made available over 1 million catalogue descriptions.

In addition to increasing access to information online, the new catalogues replace those formerly hosted by Somerset and Devon County Councils and made available through their websites.

Somerset data was also made available on the **Ancestry** website for the first time during the year. The data, presently comprising 7,403,184 entries, was launched in July 2016, and between 12 and 31 July there were 391,469 views. Further Somerset data will be added to the site in December.

Other major projects and work undertaken included:

- **Digital preservation of the Kenyon collection** – over 45,000 large-format photographic negatives of Somerset people and places from the 1920s onward. The project was time critical because the collection was suffering irreversible decay as a result of Vinegar Syndrome. Many volunteers supported the work of the project.
- An archivist for the externally-funded **Wyndham Archive Project** joined the Trust in April to start fifteen-month cataloguing project of a key West Country estate collection.
- The digitisation phase of the **Know Your Place** historic mapping project took place, and was due to be completed in Somerset at the end of December.
- At the Somerset Heritage Centre, **closed period** activity included the extensive re-ordering of the Axbridge Borough Archives following the re-cataloguing of this outstanding collection, rich in medieval records. Much other repackaging and relisting was undertaken, and a full stock take of the Somerset Studies Library was completed.
- On 25 January a **joint training and discussion day** was held at the Devon Heritage Centre for staff of the Devon and Somerset Archive Services. Subjects covered included digital preservation, customer care, volunteer engagement and the use of the CALM system for document management.

Applications for the **accreditation** of the Somerset and Devon Archives and Local Studies services were completed and submitted on 21 October 2016. The work needed to complete the applications was very extensive.

Following agreement by Somerset County Council, the **opening times** of the searchroom at Somerset Heritage Centre were reduced from 4.5 standard days per week to 4 standard days per week. Half-day general public opening on Monday ended with effect from 1 September 2016. The searchroom continues to open on one Saturday each month.

The purpose of the change was to:

- Provide the capacity to support the increasing provision of online archive materials
- Enable staff resources to be re-focused on other areas which have been identified as high priorities, including outreach, learning, digital preservation and website development
- More closely align opening times for the Somerset and Devon Archives & Local Studies Services, thus increasing opportunities for joint training and liaison between the staff
- Respond to an increased demand for engagement with archives through events, courses and partnership project work with community groups and organisations. The alteration in opening hours means the searchroom can be used more flexibly for courses and events
- Respond to the national trend of gradually falling numbers for on-site visits, which is also being experienced in Somerset

3.7 Historic Environment and Estates

During the period the service has managed the largest proportion of Trust income received from externally-funded projects, including Hinkley Point C and the Avalon Marshes Landscape Partnership.

In the year, 1,524 requests for **archaeological and conservation advice** were received from local authorities, averaging 6.9 per working day. The complexity of the requests varied greatly, with some responses taking many hours to complete.

227 advice requests were received from Natural England in relation to agri-environment schemes.

The **Somerset Historic Environment Record (HER)** online was re-launched on 5 September. The Somerset HER is a record of the known historic environment in the modern administrative county of Somerset (excluding Exmoor National Park) and presently contains 34,131 entries. The re-launched site includes large amounts of new map and aerial photographic data, including high-resolution digitised and geo-rectified images of all Somerset's 19th-century tithe maps.

<http://www.somersetheritage.org.uk/> This new site, together with the on-line archives and local studies catalogues, represents a very major achievement in respect of on-line access to heritage information.

In May an excavation led for the Trust by the Trust and supported by volunteers uncovered for the first time in 50 years the medieval **chapel of St Bridget** on the Trust's site at Beckery, Glastonbury. The excavation, whose major purpose was to establish the date of burials at the chapel, received national attention and attracted many people to an open day held on 22 May.

<http://www.bbc.co.uk/news/uk-england-somerset-36344363>

With the support of funding from the Avalon Marshes Landscape Partnership Project and Historic England, the Trust undertook excavations during September on the line of the **Neolithic Sweet Track** (constructed in 3807 or 3806 BC). The work was intended to inform a water conservation project to safeguard the preservation of the internationally-important buried remains. An archaeological delegation from Japan visited the site during the excavations.

The Trust's historic reconstruction buildings at the **Avalon Marshes Centre**, Shapwick, made rapid and impressive progress. They will become major learning assets for the Trust and have already offered important volunteering opportunities. The hypocaust in the Roman reconstruction building was lit, the first time such an event is likely to have happened in Somerset for 1,550 years. 160 children trialled various activities in the reconstructions, and open days were held on 5 and 11 June, the second of them to celebrate the launch of the Mick Aston Young Archaeologists Club.

<https://avalonarchaeology.wordpress.com/2016/06/10/flues-valleys-glass-and-viking-invasion/#jp-carousel-1458>

During August and September, the Trust provided advice to **Sedgemoor District Council** in respect of a development in Bridgwater on the site of the former medieval Hospital of St John the Baptist. Significant elements of the historic site, including medieval skeletons, were revealed.

On 10 August the Historic Environment Service supported the **Quantock Hills AONB** Service during an assessment visit by the Heritage Lottery Fund. The visit was in respect of a major bid for funding for a Quantock Hills Landscape Partnership. T

During the year, Taunton Deane Borough Council procured a **conservation advice service** from the Trust for three months. The purpose was to maintain the provision of service to the public during a recruitment exercise. The collaboration was positive and the Trust made a temporary appointment to undertake the work.

The delayed planting of a new **tree ring on Cothelstone Hill**, intended as a centenary memorial to those who died in the First World War, took place during the year.

On 13 July, the tenancies at will of 400 acres of **landscape heritage sites** in Somerset were replaced by leases for 30 years from the County Council.

3.8 Learning

The provision of our formal learning programme has remained resilient throughout the transition to trust status.

The **number of children** attending formal learning sessions was 10,605, who attended 355 sessions. In the previous year, 10,683 children attended 353 sessions.

The vast majority of the children attending formal learning sessions, delivered by our Formal Learning Officer, do so at the Museum of Somerset. A small number of sessions are delivered at schools using retained freelancers.

The service continues to achieve strong feedback:

'I felt the session met curriculum objectives very well.'

'The two leaders of our session were fantastic. The children were engaged, motivated and enthusiastic about the activities.'

'We had a great day starting with our historic tour around Taunton and finishing with you in the afternoon. The children found your exhibits and Lizzie's talk really interesting. Thank you for having us.'

'I just wanted to thank you for a fabulous workshop on Tuesday. The children clearly enjoyed every aspect of the morning's activities and were able to write a great deal about what they had learnt on Wednesday.'

Extensive work has been completed to restructure the **formal learning subscription system**. We are now managing subscriptions directly rather than through a system operated by Somerset County Council. As a result, we have more flexibility in marketing and in setting charges.

A new **Loans for Learning database** is now operational. There will be a programme to upgrade data held on the system.

The **informal learning** provided through the Trust has been extensive and has included many family learning events. These are particularly popular throughout the school holidays and highlight different themes and the content of temporary exhibitions. 7,529 people attended informal learning sessions, which were led by the Informal Learning Officer.

The Informal Learning Officer also runs **reminiscence sessions** for older people. New publicity material for reminiscence sessions was created, and the sessions are being offered in Devon as well. Feedback from reminiscence sessions was very good and suggested the potential for extending the service. The following comments were typical:

January 2016 – 'No parts to be improved upon. We are arranging more. Excellent session.'

August 2016 – ‘We had lots of comments on how engaging John was and how well he ran the session. Also how he spoke loud and clear which was important for this group.’

September 2016 – Book at least once a year. Each talk is always of interest to most. John always give an interesting talk and it is always a pleasure to have John visit.

On 22 November the Somerset Heritage Centre was taken over by Year 5 pupils from Staplegrove Church School as part of **National Takeover Day**. Pupils undertook a range of activities including helping in the searchroom, sorting and cataloguing documents and doing research. One pupil said that he and his friends thought it was the ‘best school trip ever’.

In partnership with Somerset Rural Youth Project, a project called **Women by Women** was delivered. In the course of the project participants worked together to make a documentary film, a photographic exhibition and a book as an inspiration to other young people.

From 2 to 6 July the Museum of Somerset hosted an exhibition of work created by more than 850 Somerset school children as part of the **Take One Project**. Their work was inspired by Charles Napier Hemy’s picture *Oyster Dredgers at Porlock Weir*, and explored themes including Porlock’s Victorian past and the beauty of oysters.

On 8 July the Learning Team and a Trustee representative met in preparation for the **Safeguarding Annual Review**. The Formal and Informal Learning Officers are the two Designated Safeguarding Officers (DSO) for the Trust. As part of a programme of training, safeguarding training was given to the Archives and Local Studies team in Somerset.

The Trust continued to hold a range of **courses for adults** about specialist themes and areas of research relating to Archives and Local Studies. These are always well received and booked to capacity.

‘The palaeography course was excellent – I found it fascinating and really enjoyed it, so thank you for giving me the opportunity to take part in it...By the end of the course I really felt that I had made good progress and am now much more confident at deciphering secretary hand.’

3.9 Exhibitions, Events and Outreach

The **New Dimensions** exhibition, supported by funding from Arts Council England, was launched at a private view in the Museum of Somerset on 15 January. It featured work created by a group of professional artists who were given behind-the-scenes access to the museum and archive strongrooms, and who re-imagined what they found in film, photography, sculpture, textiles and poetry. See <https://vimeo.com/152962268>. The exhibition closed on 16 April.

The **Becket Casket** spotlight loan exhibition opened on 30 January and continued until 2 April. It was made possible by the generous co-operation of the Victoria and Albert Museum as well as the support of Arts Council England and the Department for Culture Media & Sport. Although the casket was never likely to compete in the popular imagination with the Alfred Jewel, the exhibition was very well received and was seen by some 15,400 people during the months of February and March. Following an inaugural lecture by Professor Nicholas Vincent, there were further lectures on 25 February, 10 March and 22 March, all of them well attended. Becket Day at the Devon Heritage Centre on 15 February, organised in cooperation with the Devon History Society, proved a very successful and happy collaboration.

Captured in Time: the Art of Harry Frier opened for six months in the Hammet Room on 19 March and was the first such exhibition to be held in the recently-created new gallery.

The exhibition **The Art of Victor Ambrus** ran at the Museum of Somerset from 23 April to 2 July. The launch event on 22 April brought together many of Victor Ambrus's *Time Team* colleagues in a celebration of his lifetime's achievement as an artist and illustrator. The national magazine, *British Archaeology*, contained an extensive feature on the exhibition.

The family-focused summer exhibition **Pirates! Fact & Fiction** opened on 9 July and included material as wide-ranging as Jack Sparrow's costume from *Pirates of the Caribbean* and a portrait of the West Country buccaneer, William Dampier of East Coker. The exhibition was open until 1 October and an admission charge applied.

The private view of the exhibition **Wild Art: Nature Re-imagined** took place at the Museum of Somerset on 7 October.

Other notable events included:

The planting of a new tree ring on **Cothelstone Hill** took place on 11 December and included representatives of the Trust, the County Council, the Rifles Regiment, the Quantock Hills AONB and the Friends of Quantock. Children from Bishop's Lydeard Primary School also took part in what proved to be a moving and memorable occasion. The trees are intended to perpetuate a much-loved landmark and as a centenary memorial to Somerset people who died in the First World War.

Chris Webster's magisterial **study of Taunton Castle** was published at the end of April. His book, which runs to 360 pages, presents the archaeological and documentary evidence relating to the Taunton Castle site and is a remarkable research achievement. Chris, who is the Trust's Historic Environment Record Officer, supervised the archaeological investigations associated with the Museum of Somerset project.

https://www.freewebstore.org/SANHS/Taunton_Castle/p823372_15642595.aspx

Somerset Day on 11 May was marked by the exhibition **Somerset Archive Treasures from Devon** which was held at St James's Church, Taunton. The occasion mirrored the similar event held in Exeter Guildhall during 2015.

The Trust cooperated with its partners, the **Quantock Hills Area of Outstanding Natural Beauty**, Halsway Manor and the Friends of Quantock to celebrate the AONB's 60th anniversary in June. The Trust provided a lecture at Halsway on 28 June, and participated in the lighting of a beacon on Cothelstone Hill on 30 June.

A conference was held at Strode Theatre on 4 June to present and celebrate the work achieved by the **Avalon Marshes Landscape Partnership**, of which the Trust is a member.

The Trust was represented by invitation at the **Glastonbury Festival** in June and at **Yeovil Show** in July to promote the Rural Life Museum and the Supporters' Scheme. Many hundreds of people interacted with staff on these occasions.

The Trust participated in the **National Festival of Archaeology** in July and held a very popular Crafts of Ancient Avalon event at the Avalon Marshes Centre on 30 July.

An exhibition celebrating the **Women by Women** project, led by Somerset Film, was launched at the McMillan Theatre, Bridgwater, on 22 August. The Trust was a partner in the project.

The programme of temporary exhibitions, events and activities remained very ambitious. The total number of **heritage events** delivered within the year was 546, with 19,024 people attending.

These numbers are very similar to those achieved in the previous year, when 508 events were attended by 19,566 people.

3.10 Collections Care and Acquisition

The **Frome Hoard**, the largest hoard of Roman coins ever discovered in a single container in Britain, was the centrepiece of an exhibition at the British Museum which ran from December 2015 to May 2016.

Funding bids for the acquisition of Tristram Hillier's painting *The Vale from Cucklington* (1943) were successful. The painting was received on 22 January and is now displayed in the 'Making Somerset' gallery at the Museum of Somerset.

A portrait by Thomas Beach, a pupil of Reynolds, showing **John Rogers of Yarlington**, 1793, was purchased at auction on 16 January. Rogers, who is shown holding a volume of Shakespeare's plays, acquired and improved a large farming estate at Yarlington and built a fine new house for himself on a windswept site. George III, seeing the house on his way to Weymouth, is reputed to have said 'A bold man to build a house there. A bold man.' The painting is intended for the new displays at Somerset Rural Life Museum.

A major public fundraising campaign was launched during the year to enable the acquisition of the **Yeovil hoard**. The hoard, dating from the second and third centuries AD, was discovered in March 2013 while ground works were being carried out at Yeovil Recreation Centre. The major part of the total cost was secured from national sources, with generous support provided by the Friends of the Museum of Somerset. We are also very grateful for the kind co-operation of South Somerset District Council.

The Trust acquired a **stick barometer** of c. 1820 by Peter Caminada of Taunton on 6 July. It will be displayed at Somerset Rural Life Museum.

A **portrait of the Duke of Monmouth**, c. 1675, was acquired at auction on 19 July. It was displayed at Westonzoyland Church on 3 September where it was viewed by a large number of local people. It will be subject to a conservation assessment before going on permanent display at the Museum of Somerset.

With generous support from the Friends of Somerset Rural Life Museum and a private donor, the Trust has been able to commission a major **painting from the artist James Lynch**. It will be a key exhibit in the new museum displays. James Lynch is renowned for his large landscapes of the Somerset countryside painted in egg tempera.

An inn sign from the **Hood Arms, Kilve**, was acquired at auction for Somerset Rural Life Museum on 8 April. It will form part of the new 'Working Village' gallery at the museum.

In August the Trust successfully negotiated with the Natural History Museum an extension of the five-year loan of **Camelotia borealis**, which is displayed as part of the permanent exhibition of Somerset's prehistory in the Museum of Somerset. Camelotia is the only dinosaur for which substantial remains survive from Somerset.

A warrant of 1627 under the sign manual (or signature) of Charles I was acquired with money from Founder Member donations on 16 March. The warrant, addressed to Sir Robert Heath, the Attorney General, records the king's intention to disafforest the royal forests of Neroche and Selwood in Somerset 'for the improving of our Revenue'. The proposal was one example of the king's unpopular attempts to raise money for financing war against France.

Phase 2 of the **review of the fine art collection** was completed. This work, together with a conservation assessment by an independent fine art conservator, enabled priorities to be agreed for a programme of conservation work. With funding from Somerset Archaeological and Natural History Society the first two works have been conserved. They are *Emanuel Wills, Parish Clerk, Thurloxton*, by the Bristol School artist Edward Villiers Ripplingille, and *Charles Broom, Creech St Michael Parish Clerk* by Fred Lake. Both paintings are likely to be included in the displays at Somerset Rural Life Museum.

A letter referring to the Rye House Plot was acquired at auction on 22 September. The letter, dated 27 June 1683, was written from Whitehall to John Pigott, Sheriff of Somerset, and expresses Charles II's concern, in the aftermath of the plot, that an insurrection was planned at Taunton. The Rye House Plot was an abortive attempt to assassinate the king and his Catholic brother, the Duke of York, on their return from the races at Newmarket.

Following changes to the 20-year rule, a very large deposit of **magistrates' court records** was received from South Somerset and Yeovil on 19 September.

All the acetate negatives in the **Kenyon collection** were digitised and the protection of the glass plate negatives was completed. The collection was suffering from Vinegar Syndrome and the decay of the images was becoming rapid. A talk was given in Wellington about the collection in September.

The first phase of the project to list **records of the Wyndham family** neared completion. The project is funded by The National Archives and will provide research access to a major Somerset collection rich in medieval and later records.

Partnership projects relating to the archives of **Yeovil Town and Exeter City football clubs** have begun.

The acquisition of the archives of **Yeovil Agricultural Society** was completed and achieved excellent press coverage.

A new on-line catalogue for the Somerset archive collections was launched in the week beginning 21 March and gives access to about 500,000 catalogue descriptions. It has been well received by users and sets a very high standard for such catalogues. See: <http://someset-cat.swheritage.org.uk/> The contractor, Metadatis, was subsequently commissioned to undertake the creation of a similar on-line catalogue for the Devon archive collections (comprising about 380,000 catalogue descriptions). The completion of this work during the year represented a very important achievement for the Trust.

The new **Local Studies cataloguing system** is now operational on-line and includes catalogue data for the Somerset Studies Library, Somerset Archaeological & Natural History Society, the Somerset Rural Life Museum library, the West Country Studies Library and the Devon & Cornwall Record Society,. The catalogue allows searching of 200,000 records relating to printed and other sources of West Country history.

Material from the Trust's Somerset archive collections (predominantly parish registers) was launched on the **Ancestry website** on 14 July. It comprises 7,403,184 entries contained in 399,782 images and its launch represented a transformational moment for access to genealogical sources for Somerset. Much more data will become available before the end of the year.

http://www.somersetcountygazette.co.uk/news/14619922.First_chance_to_explore_historical_Somerset_records_online/

3.11 Volunteers

Events held before Christmas in Somerset were opportunities to thank our many **volunteers** for the essential work they do for the heritage of the South West.

Across the twelve months of the year, an average of 145 volunteers were engaged with our activities in Somerset, contributing a total of 23,291 hours. This is equivalent to 3,147 working days. The sheer scale of the support provided to the Trust and staff by our committed volunteers enables activities which could not be undertaken otherwise. We are very grateful to them.

3.12 Partnerships and major meetings

The Trust is actively engaged with many external organisations, partnerships and representatives:

- A meeting took place on 2 November with the Director of **the Royal Albert Memorial Museum**, Exeter, on future cooperation.
- On 12 November the new **Lord Lieutenant, Mrs Annie Maw**, visited Somerset Military Museum, the Museum of Somerset and the Somerset Heritage Centre.
- A meeting with the chair of **Museums in Devon** took place on 18 November to discuss partnership opportunities.
- The Trust was represented on the national **Archive Fundraising Programme**, following invitation by The National Archives.
- The Trust was represented on 3 December at the **Taunton Business Conference**.
- The Trust was represented at a meeting on 13 January to discuss Taunton-based events related to the **Cricket World Cup in 2019** (Taunton is hosting three matches).
- A meeting was held on 18 January with **Devon County Council's Historic Environment Service** to discuss possible future arrangements for the management of archaeological archives.
- A meeting was held on 18 January with Sam Rowlands, Relationship Manager for Museums with **Arts Council England**.
- The Trust reported to the AGM of the **Somerset Military Museum Trust** on 17 March.
- The new Engagement Officer for **The National Archives**, Owen Munday, visited the Devon and Somerset Heritage Centres on 22 February, and expressed his admiration for what the Trust was achieving.
- The **Cultural Education Partnership** in Somerset has been convened with the support of Arts Council England. The partnership brings together many key organisations involved with the provision of cultural activities in Somerset, including the Trust.

- The Trust is represented at meetings of the **Creative Industries Partnership Group**, which also includes representatives of ACE, Somerset County Council and the creative industries. A primary objective of the group is the creation of a Cultural Strategy for Somerset.
- The Trust met the **Quantock Hills AONB** on 14 March to discuss the management of Cothelstone Hill and a proposed Big Quantock Bid to the Heritage Lottery Fund.
- The Trust, on behalf of Somerset County Council, reported to the AGM of **Somerset Archaeological and Natural History Society** on 14 May (when the Presidential Address was given by the Head of Historic Environment and Estates, Bob Croft).
- The Trust reported to the AGM of the **Museums in Somerset Group** on 16 May.
- A meeting was held on 8 June with the chairman of the **Bath & Wells Diocesan Advisory Committee** to discuss the basis of the Trust's participation in the committee.
- A meeting was held on 8 June with Matt Heard, **Natural England's** Area Manager for Somerset, Avon and Wiltshire, concerning the redevelopment of the Avalon Marshes Centre site.
- A meeting took place on 10 May with Vanessa Lefrancois, Chief Executive of the **Brewhouse Theatre & Arts Centre**, concerning future cooperation.
- The Trust was represented on 20 September at a Heritage Discussion Forum organised by the **University of Exeter**.
- On 15 September the Trust hosted a meeting of the **South West Heritage Forum**, a group representing historic environment practitioners and agencies in the region.
- On 28 September officers meet **Neil Mendoza, a non-executive director of DCMS, and Sir Simon Thurley, former Chief Executive of English Heritage**, as part of a government review of England's museums. The review report is due to be published in the summer of 2017.
- The Trust gave partner support to bids, from South Somerset and Exeter City, to the **Great Place Scheme** funded by Arts Council England, the Heritage Lottery Fund and Historic England.
- The Trust has been represented at a range of **society AGMs and events**, including for the Devon Family History Society, the Devon History Society, the Friends of Devon's Archives, Somerset and Dorset Family History Society, the Devonshire Association, and SANHS.

3.13 ICT

An **IT Manager** for the Trust was successfully recruited and began work on 4 January. His principal task was to specify and project manage the migration of ICT systems from county council servers to an independent environment.

A **Request for Proposal** document was issued to eleven prospective vendors on 22 February for a proposal to design, build, configure and implement the new and independent **ICT solution** for the Trust. Three vendors were shortlisted to present their proposals.

Following the interviews on 19 April **Vysiion Ltd** of Chippenham were awarded the contract to undertake the work. The project included the provision of new hardware and infrastructure across all sites. Somerset staff were migrated to the new environment between 8–12 October.

The **migration process in Devon** was delayed as a result of site-related issues and is scheduled to take place in February 2017.

The benefits of working with the new system were immediately apparent to staff and its full potential is being explored for future development.

3.14 Governance

The Trust reported to **Somerset County Council's Scrutiny Committee** on 1 March:

<http://www1.somerset.gov.uk/council/board43%20scrutiny%20place%5C2016%20March%201%20-%20Item%206%20SWHT%20report.pdf>

The **Annual Outcomes Meeting** with Somerset and Devon County Councils took place on 9 March and was a positive occasion.

The annual meeting of the **North Somerset Heritage Panel** took place on 15 April to consider the Trust's care of North Somerset's archive and museum collections and the support given to Weston Town Council in respect of Weston Museum. The meeting was positive and supportive. **The Annual Meeting with Torbay Council** took place on 4 April at Torre Abbey when it was confirmed by the council that it wished the archive agreement to continue.

A **six-monthly monitoring meeting** with Somerset and Devon County Councils took place on 15 June. In the period to 30 April the Trust was able to report 51,748 users of its services, 6,442 children attending formal learning session, 2,990 people attending informal sessions, 13,616 volunteer hours, 9,311 people attending heritage events, and 355,413 visits to our websites. During the period we received 778 requests for advice relating to the historic environment and accessioned 328 archive collections.

Two further **Patrons of the Trust**, in addition to Lady Gass, were appointed during the year:

- **Mrs Annie Maw, HM Lord-Lieutenant of Somerset.**
- **Mr David Fursdon, HM Lord-Lieutenant of Devon.**

3.15 Board

Meetings of the Board of Trustees took place on 19 November, 11 February, 14 April, 21 July and 13 October. The scheduling of the meetings has been adjusted to ensure they now take place prior to the end of each quarter.

The Board deals with specific areas of work through three committees:

- Personnel Committee – 4 meetings in the year
- Marketing and Communications Committee – 3 meetings in the year
- Finance Committee – 4 meetings in the year

A meeting of **South West Heritage Trust Trading Limited**, the Trust's trading company, took place on 23 June.

Nick Denison retired from the Board of Trustees on 30 June to undertake wide-ranging travel abroad.

Angela Harper retired from the Board on 22 July to concentrate on the development of a new hotel business in North Wales.

The **Trustee and Staff Away Day** took place on 13 April and was generally regarded as a worthwhile and successful occasion which allowed discussion, in particular, of the Trust's Vision and future direction. The outcomes and analysis of the activities of the day have been used to advise future strategies and new priorities for the Trust. Based on a major theme emerging from the day, an additional statement has been added to the Vision, Mission and Strategic Themes of the Trust:

- *We will provide rich heritage experiences for everyone.*

3.16 Advisory

The Trust's **Advisory Forum** met at the Pearson Education Centre, Exeter Cathedral, on 7 March. The forum heard a report on the Devon Archives & Local Studies Service as well as on the Supporters' Scheme.

The second bi-annual meeting of the **Advisory Forum** took place on 5 September when the recruitment of new trustees, the Supporters' Scheme, and the progress of the Somerset Rural Life Museum project were discussed.

3.17 Income Generation

During the year, the Trust used external funding to support a wide range of **projects**. They included:

- Avalon Marshes Landscape Partnership
- Devon Remembers Heritage Project
- Hinkley Point C Outreach
- Hinkley Point C Planning
- Hinkley Point C Public Works
- Manorial Documents Register – Devon
- North Devon Record Office
- Somerset Rural Life Museum redevelopment
- Wyndham Archives Project

A range of successful **funding applications** helped to meet the costs of key acquisitions, including the Yeovil Hoard and Tristram Hillier's *The Vale from Cucklington*.

Income was secured for archive care, conservation and cataloguing through agreements with Beaford Arts and Dartington Hall.

The income generated through the **Trading Company** has remained resilient with a 14% increase achieved over the previous year. The profits of the company were Gift Aided in full to the parent Trust.

The formal launch of the **Supporters' Scheme** was held at the Museum of Somerset on 22 March, combined with a Private View of the Becket Casket. The occasion was also used as an opportunity to thank Founder Members for their generosity and to highlight additions to the collections made possible by Founder Member donations. Those additions included the portrait of John Locke from the studio of Sir Godfrey Kneller, a Civil War gold coin hoard from Taunton, an order under the sign manual of Charles I and materials for the Devon local studies collections.

An application to Arts Council England’s **Grants for the Arts** scheme for £48,661 was submitted to support a project led by the Museum Development Officer. The project is entitled MUSE: Makers in Museums Project.

A major application for support as a **National Portfolio Organisation** was developed for submission to Arts Council England by 1 February 2017. If successful, significant additional resources will be brought into the Trust to support new activities in museums between 2018 and 2022.

3.18 Staffing

The **Staff Forum** is a group of representatives from all teams of the Trust which meets on a regular basis to discuss matters concerning HR, personnel and working conditions. Each meeting of the Staff Forum is attended by at least one Trustee. The group met five times during the year and the discussions were constructive and positive.

Notable changes in staffing included:

- **David Walker**, Curator of Social History with the Museums Service and one of our longest-serving members of staff, retired on 31 March. David joined the service in August 1986 and was responsible for preserving, interpreting and developing the agricultural, social and industrial history collections. He was also a key figure for Somerset Rural Life Museum and the Brick & Tile Museum, and served for several years as chair of the Rural Museums Network.
- Fixed-term contracts for a **Wyndham Archive Project Archivist**, a **Conservation Officer** and a **Historic Environment Record Assistant** began to develop specific areas of work.
- The Trust’s longstanding **Formal Learning Officer**, Lizzie Mee, left for a new post on 15 August. Lizzie achieved significant successes and dealt with a demanding schedule with school groups. The vacancy created was filled by Chloe Grant shortly after the start of the new school year.
- Adjustments to the staffing of the **Somerset Archives & Local Studies Service** were implemented to adapt to changing needs, in particular to create more capacity for engagement and outreach work.

Based on the contract hours worked throughout the year, the Full-Time Equivalent (FTE) staffing levels across the Trust, including project staff were:

Service provision	64.8
Finance and administration	7.65
Fundraising	0.5
Management	4.8
Total	77.75

Section 4. Looking forward

The Senior Management Team prepare a refreshed Business Plan annually to guide the progress of the Trust in line with:

- Charitable objectives
- The contemporary operational environment
- Sectoral opportunities
- The Agreed Activities of the legal agreements in place with Somerset and Devon County Councils.

The following activities are planned from November 2016.

A. Audiences

A.1 Help people from all backgrounds to learn from our heritage and be inspired by it

- Provide extensive opportunities for people to learn from:
 - Museum collections and objects
 - Archive and local studies collections
 - Archaeology and the historic environment
- Create a Trust-wide Learning Strategy to coordinate and develop services
- Recruit a second Formal Learning Officer to be based at the Somerset Rural Life Museum
- Sustainably grow the Loans for Learning resources
- Review opportunities for significant development of Learning Services as an NPO
- Develop a project to transform the Loans for Learning offer, and to extend learning resources in Devon
- Maintain the development of reminiscence sessions across Somerset and Devon
- Establish new uses of the searchroom at Somerset Heritage Centre on Mondays
- Undertake the Devon Remembers Heritage Project

A.2 Encourage individuals and communities to get involved in our heritage

- Assess and further develop volunteer co-ordination and training
- Extensive volunteer recruitment process initiated to support the re-opening of Somerset Rural Life Museum
- Develop the public offer at the Avalon Marshes Centre following completion of replica buildings
- Partnership opportunities with Exeter University and other organisations
- Apply for funding to support Muse – Makers in Museums
- Apply for funding to support Our Town, Our Museum, Our Place
- Support the Somerset Victoria County History Project

A.3 Make our heritage as accessible as we can

- Complete the refurbishment of the Somerset Rural Life Museum in Glastonbury
- Continue the Trust role to support Weston super Mare Museum refurbishment to completion
- Complete the Manorial Document Register Projects for Devon

- Hinkley Point C Project is completed in line with the Grant Agreement between the Trust and SCC
- Ensure there is safe and reasonable access to heritage sites managed and cared for by the Trust
- Secure all necessary permissions for a Spotlight Loan to be hosted at the Museum of Somerset in 2017
- Engage appropriately with emerging partnership projects
- Exhibition of Somerset and Devon maps
- Specify and procure a new website and host platform
- Newly launched Somerset and Devon Archive online catalogues and West Country Studies Library are promoted and celebrated
- Newly launched HER is promoted and celebrated
- Research and seek funding for a new Digital Preservation system for Somerset and Devon Archives in line with best practice advice from The National Archives

B. Collections and Heritage Assets

B.1 Ensure collections are developed, managed and cared for

- Maintain and develop the Loans for Learning Collection
- Continue the review and rationalisation of the fine art collection and continue a programme of prioritised conservation. The latter will be dependent on fund raising
- Review and rationalise the textile collection and associated material
- Support Somerset Military Museum in its review and rationalisation of collections
- Work with Royal Holloway, University of London, on the excavation, study, publication and archive deposition of the Quaternary period site at Gulley Cave, Cheddar.
- Support Somerset Military Museum in its review and rationalisation of collections
- Fundraising to safeguard archive collections, including through the Acceptance in Lieu Scheme, as need and opportunity arises
- Work with Beaford Arts to deliver an HLF project to improve care of and access to the Ravilious Photographic Archive
- Complete Devon Tithe Map Project and involvement in the Know Your Place Project, a major partnership project to provide online access to a range of historic maps for Somerset, Devon, Gloucestershire and Wiltshire
- Develop knowledge of digital preservation, with the aim of creating a digital repository, as funding allows
- Assessment and conservation work on Friendly Society banners (subject to external funding)
- Seek designed status for heritage collections
- Complete the project to catalogue and develop the Wyndham Estate Archive, funded through the National Cataloguing Grants Programme
- Deliver development plan for collections management in Devon
- Managing change in the historic environment. Ensure appropriate links to the planning system and the implementation of NPPF in collaboration with County and District Councils
- Diocesan Advisory Committee (DAC): work towards the smooth implementation of the new Faculty Rules with district councils and of the on-line faculty application system.
- Heritage Sites and heritage assets managed and cared for

- Deliver a range of Historic Environment advice and works to ensure guardianship and care of historic sites and assets

C. Resources

C.1 Build partnerships with funders and stakeholders and increase financial sustainability

- Implement the PR and Communications Strategy
- Implement the Funding Strategy
- Continue to seek new opportunities for funding streams to safeguard services and heritage at risk
- Coordinate and track funding applications, strategic and operational support given and partnership work

C.2 Ensure that our workforce is skilled and diverse

- Provide annual training opportunities for all staff as appropriate
- Assess staffing structure

D. Management, Governance and Transformation

D.1 Strive for excellent, ambitious and entrepreneurial services

- Implement further transition requirements for the successful operation of the Trust
- Complete the Rural Life Museum redevelopment project
- Submit an application to Arts Council England to become a National Portfolio Organisation
- Review opportunities for the promotion of commercial conservation services in Somerset and Devon
- Fulfil the requirements of archive accreditation
- Increase understanding of visitor profiles and interests, adopting new technology as appropriate
- Work with the Royal Albert Memorial Museum, Exeter
- Re-launch the North Devon Archive Service and continue planned programme of development
- Celebrate ARA Record-keeping Service of the Year award
- Complete the implementation of the ICT infrastructure project
- Following the re-opening of the Somerset Rural Life Museum re-apply for full Accreditation. Endeavour to align the timing with the re-application for the Museum of Somerset which becomes due in late 2017.

Section 5. Temporary Exhibitions – November 2016 to October 2017

Event Details	Date	Time	Venue
<p>RPS International Print Exhibition Selected from a worldwide open call by a panel of industry professionals, the exhibition showcases a rich variety of photographic genres.</p>	Saturday 14 January – Saturday 11 March	All day	The Museum of Somerset
<p>A Fragile Beauty: Camden Town Artists in the Blackdown Hills An exhibition of art from the Camden Town Group, on loan from numerous museums and galleries around the UK. The works focus on scenes in and near the Blackdown Hills</p>	Saturday 25 March – Saturday 8 July	All day	The Museum of Somerset
<p>The Castle Cary Coin Hoard A Civil War hoard of 152 silver coins was discovered at Castle Cary in 2006 and is now in the care of the Trust. In partnership with the town of Castle Cary, the hoard briefly returns home. An associated talk is planned.</p>	Saturday 8 April	All day	Castle Cary Town Hall
<p>Herd and Harvest A specially-created exhibition by the artist Kate Lynch to mark the opening of the newly-refurbished Somerset Rural Life Museum</p>	Spring 2017	All day	Somerset Rural Life Museum
<p>War and Prose: Devonshire Literature in the Great War Exhibition about Devon’s literature in the First World War as part of the Devon Remembers Heritage Project</p>	Spring 2017	All day	Exeter Central Library
<p>Devon Caring in War Exhibition of colourised medical photographs from the First World War as part of the Devon Remembers Heritage Project</p>	Spring 2017	All day	Royal Devon and Exeter Hospital, Torbay Hospital, and other Devon hospitals
<p>Glass Art Exhibition of glass artwork by Teignmouth pupils inspired by the Devon Remembers Heritage Project</p>	Spring 2017	All day	Teignmouth Community School
<p>Devon Farming in the First World War Touring exhibition as part of the Devon Remembers Heritage Project</p>	Summer 2017	All day	Mid-Devon, North Devon, Okehampton and Honiton shows
<p>Manors of Somerset and Devon Touring exhibition following the successful completion of the Somerset and Devon Manorial Documents Register projects</p>	Spring 2017 – Summer 2018	All Day	Somerset Heritage Centre, Devon Heritage Centre, North Devon Record Office
<p>The Dickinson Archives</p>	Summer 2017	All day	Kingweston

An exhibition to be held in partnership with the Dickinson trustees at Kingweston House, the family's ancestral home.	(details TBC)		House, Somerset
Historic Map Exhibition – Wells A special one-day exhibition, displaying historic maps of the South West from the archive collections of Somerset and Devon	Thursday 22 June	From 10:00	Wells (venue TBC)
Historic Map Exhibition – Exeter A special one-day exhibition displaying historic maps of the South West from the archive collections of Somerset and Devon	Tuesday 27 June	From 10:00	Exeter Guildhall
Rhyme Around the World This lively and colourful exhibition invites families to step into their favourite nursery rhymes and discover new ones from around the world, exploring how stories, song and rhyme are shared across generations and continents	From Saturday 22 July – Saturday 7 October	All day	The Museum of Somerset
Colours of Exile: The Somerset Art of Hans Schwarz An exhibition of works by the internationally renowned Austrian artist Hans Schwartz, who settled in Stogursey, Somerset, after fleeing the Nazis	Saturday 20 October 2017 – Saturday 25 February 2018	All day	The Museum of Somerset
The Return of the King The earliest English royal portrait taken from life, of Henry VII, travels from the National Portrait Gallery to be a spotlight loan at the Museum of Somerset. This extraordinary treasure will be interpreted in the context of the Perkin Warbeck Rebellion, which King Henry crushed at Taunton in 1497.	October 2017 – January 2018 (exact timing TBC)	All Day	The Museum of Somerset

Appendix A. Agreed Activities – reference to achievements

1. Somerset residents, visitors and other people understand, experience and enjoy the county's heritage

Agreed Activities	Key Performance Indicator / Reference / Supporting Document
1.1. Enabling people from diverse backgrounds to learn from Somerset's heritage and be inspired by it	
<p>S1.1.1</p> <p>The Trust will provide and promote access to museum and visitor attractions, including through offering excellent customer service, at the following locations:</p> <ul style="list-style-type: none"> • The Museum of Somerset (managed in accordance with a 25-year agreement with the Heritage Lottery Fund dated 20 March 2008). • Somerset Rural Life Museum (managed in accordance with a 25-year agreement with the Heritage Lottery Fund dated 19 September 2013 and subject to a programme of redevelopment work scheduled to be completed in 2016). • Other locations, including the Somerset Brick and Tile Museum. 	<p>KPI – <i>Visits: The Museum of Somerset, Somerset Rural Life Museum, Brick & Tile Museum</i></p> <p>KPI – <i>Heritage events: The Museum of Somerset, Somerset Rural Life Museum, Brick & Tile Museum</i></p> <p>KPI – <i>People attending heritage events: The Museum of Somerset, Somerset Rural Life Museum, Brick & Tile Museum</i></p> <p>The Media Reports attached demonstrate the breadth of media coverage</p> <p>The following measures have been implemented:</p> <ul style="list-style-type: none"> • Digital Engagement Strategy • Social media coordination through a Digital Working Group • Exhibitions and Public Programmes forward schedule • Annual training programme for front of house staff • Job shadowing/exchange being undertaken across service areas • Quarterly surveys

<p>S1.1.2</p> <p>The Trust will provide supervised research access to the heritage collections in its care, such access to be sufficient to satisfy normal public demand so far as the resources available to the Trust reasonably allow.</p>	<p><i>KPI – Visits: Somerset Heritage Centre (searchroom and non-searchroom)</i></p> <p><i>KPI – Heritage Events: Somerset Heritage Centre, events and tours</i></p> <p><i>KPI – People attending heritage events: Somerset Heritage Centre, events and tours</i></p> <p><i>KPI – Archives Enquiries and Research</i></p>
<p>S1.1.3</p> <p>The Trust will interpret, explain and celebrate Somerset’s heritage in ways which can inspire all, and will adapt to changing customer and community needs.</p>	<p><i>KPI – Heritage Events: Somerset Heritage Centre, The Museum of Somerset, Somerset Rural Life Museum, Brick & Tile Museum</i></p> <p><i>KPI – People attending heritage events: Somerset Heritage Centre, The Museum of Somerset, Somerset Rural Life Museum, Brick & Tile Museum</i></p> <p><i>KPI – Website visits</i></p> <p>The Exhibitions Selection Policy guides the selection of exhibitions.</p> <p>The Exhibition and Public Programme groups undertake internal coordination of activities, planning and promotion. A key output is the creation of a forward plan for exhibitions and events.</p> <p>Feedback obtained from feedback forms, visitor books and online review sites are actively and regularly analysed.</p>

Agreed Activities	Evidence / Reference / Supporting Document
1.2. Encouraging individuals and communities to get involved in Somerset's heritage	
<p>S1.2.1</p> <p>The Trust will deliver heritage learning activities, including through arrangements with schools, community programmes with partners and externally-funded projects, so that the educational potential of the collections can be realised.</p>	<p>KPI – <i>Formal and informal learning sessions – Somerset</i></p> <p>KPI – <i>People attending formal and informal learning sessions – Somerset</i></p> <p>The Trust actively engages with the Cultural Education Partnership in Somerset to collaborate with activities.</p> <p>The Trust undertakes a range of externally funded projects to develop and deliver learning provision.</p>
<p>S1.2.2</p> <p>The Trust will deliver archaeological outreach and training projects in Somerset in conjunction with local groups, partners and other agencies.</p>	<p>KPI – <i>Heritage events: Portable Antiquities, Historic Environment (including Hinkley Point)</i></p> <p>KPI – <i>People attending heritage events: Portable Antiquities, Historic Environment (including Hinkley Point)</i></p>
<p>S1.2.3</p> <p>The Trust will implement an outreach and education programme to mitigate the irreversible loss of archaeological remains, and impacts on the settings of designated heritage assets, in areas affected by the Hinkley Point C development (see Appendix A).</p>	<p>Three members of staff were employed throughout the period to undertake the outreach and education programme.</p> <p>The supporting document attached provides a summary of the project including aims and outcomes.</p>
<p>S1.2.4</p> <p>The Trust will implement an outreach and education programme to mitigate the irreversible loss of archaeological remains, and impacts on the settings of designated heritage assets, arising from the development of a second reservoir by Bristol Water Plc at Cheddar, Somerset (see Appendix B)</p>	<p>N/A</p>

Agreed Activities	Evidence / Reference / Supporting Document
S1.3. Making Somerset’s heritage as accessible as possible	
<p>S1.3.1</p> <p>The Trust will provide and manage a programme of exhibitions and events which reach a diverse range of people.</p>	<p>The Exhibitions Selection Policy guides the process through which new temporary exhibitions are selected. The Exhibition and Public Programme groups coordinate information and planning for exhibitions and ancillary events and activities. This process leads to the publication of a forward programme not less than twice a year.</p> <p>A review of qualitative data and feedback is used to advise future events and activities. Shared experience and analysis guides opportunities to repeat successful events.</p> <p>The Exhibitions, Events and Outreach part of the report in Section 3 provides further detail of the highlights of the year.</p>
<p>S1.3.2</p> <p>Collections will be described in publicly-available finding aids, which may be made accessible remotely by electronic means, subject to restrictions imposed by law and to relevant professional standards.</p>	<p>Enrichment of digital and online content for exhibitions is provided (e.g. additional interpretive material on tablets at temporary exhibitions). Appropriate multi-media content is included in project development. Public access WiFi has been installed at all sites to enable greater levels of social media and interactive engagement.</p> <p>New online catalogue portals have been launched or revised:</p> <ul style="list-style-type: none"> • Somerset Archive Catalogue - http://somerset-cat.swheritage.org.uk/ • Devon Archive Catalogue - http://devon-cat.swheritage.org.uk/ • Devon and Somerset Local Studies Library Catalogue - http://library-cat.swheritage.org.uk/home • Somerset Historic Environment Record (HER) - http://www.somersetheritage.org.uk/ • Collections Explorer - http://swcollectionexplorer.org.uk/

2. Somerset’s heritage is protected, conserved and enhanced

Agreed Activities	Evidence / Reference / Supporting Document
<p>S2.1. Making sure Somerset’s heritage is excellently cared for</p>	
<p>S2.1.1</p> <p>The Trust will provide an Archive Service broadly in accordance with guidance published in 1999 by the then Department of the Environment, Transport and the Regions concerning ‘proper arrangements’ for records owned by or in the custody of a principle local authority. Storage conditions will seek to meet the recommendations of PD 5454:2012. Provision will be made for the preservation needs of records and for active conservation work.</p>	<p>The Somerset Archive Service conforms to:</p> <ul style="list-style-type: none"> a. Guidance published in 1999 by the then Department of Environment, Transport and the Regions regarding “proper arrangements”, under the terms of the Local Government Act 1972 sections 224–229, for the care of records in the ownership or custody of local authorities b. Requirements for being appointed an approved place of deposit for Public Records in accordance with the Public Records Acts 1958 and 1967 c. The national Archive Service Accreditation Standard administered in England by The National Archives d. The Archives and Records Association’s (UK & Ireland) Code of Conduct e. The Parochial Registers and Records Measure, 1978, amended 1992 f. PD5454:2012 (Guidance for the Storage and Exhibition of Archival Materials) and any successor standards <p>An application for Accreditation was submitted in October, in accordance with the guidance suggested by the National Archives.</p> <p><i>KPI – Document Repairs and Exhibitions Mounted</i></p>

S2.1.2

The Trust will operate a Local Studies Service chiefly comprising a library of local history books and materials.

The Somerset Local Studies Library seeks to acquire published works which fall within the following categories:

- a. Published works on businesses, estates, individuals, families, societies, organisations, public and private institutions and other organisations and activities relevant to the life and history of the county of Somerset.
- b. Works by authors who have either lived a significant part of their lives in Somerset or who have written works in which Somerset features.
- c. Published works may be acquired by gift, transfer or purchase.
- d. Theses, dissertations and research studies (predominantly unpublished) are accepted where they are relevant to the criteria set out in a. and b.
- e. Local newspapers may be acquired and microfilmed and made available at the Somerset Heritage Centre as well as at other service points (e.g. public libraries).
- f. Video and DVD recordings and electronic data, community magazines and ephemera are accepted providing they are relevant to the criteria in a. and b.

The recently launched Devon and Somerset Local Studies Catalogue includes the titles of seven library collections. It provides access to over 200,000 titles.

<p>S2.1.3</p> <p>The Trust will maintain Acquisition and Disposal policies (also called Collections Development policies) for the Archive Collection, the Local Studies Collection and the Museum Collection, and in acquiring items on behalf of the Council by gift, transfer, purchase or loan will adhere to those policies.</p>	<p>The Trust will within three years of Completion and thereafter not less frequently than every fifth year review the Acquisition and Disposal Policy and propose such amendments as it feels are best suited to the interests of the Heritage Collections and which take account of the rights and interests of relevant third parties in consultation with them and Good Collections Practice.</p> <p>The Trust will agree with the Council any proposed changes pursuant to the above clause.</p>
<p>S2.1.4</p> <p>The Trust, at the Somerset Heritage Centre, will (subject to the approval and consent of The National Archives) act as a Place of Deposit for Public Records. It will also operate at the Somerset Heritage Centre as the Diocesan Record Office for the Diocese of Bath and Wells.</p>	<p>As the designated Diocesan Record Office, the Somerset Archive Service collects diocesan records from the whole of the Diocese of Bath and Wells.</p> <p><i>KPI – Archives accessioned: number and volume in m³</i></p>
<p>S2.1.5</p> <p>The Trust will develop and implement projects to protect, conserve and enhance heritage assets in the public realm in Somerset, including assets in the Council’s ownership, working in partnership with the Council and other agencies to achieve capital funding to deliver such projects. The projects will include a scheme of archaeological monitoring and public realm mitigation in areas affected by the Hinkley Point C development (see Appendix A).</p>	<p>The Trust employs two Heritage Conservation Officers to undertake a programme of work in the public realm.</p> <p>The Historic Environment Service undertakes monitoring work in areas affected by the Hinkley Point C development.</p>

Agreed Activities	Evidence / Reference / Supporting Document
S2.2. Providing expert advice to protect Somerset's rich heritage	
<p>S2.2.1</p> <p>The Trust will provide archaeological and conservation advice to the Council in accordance with the National Planning Policy Framework (Department for Communities and Local Government, 2012), and successor frameworks or standards, and in accordance with relevant planning policies. Such advice will include archaeological and conservation advice to the Council as Highway Authority and on all heritage matters relating to the Council's own properties, including bridges, schools and other historic or listed buildings. The Trust will act for the Council in providing heritage advice on agri-environment schemes. The Trust will take part in consultations in respect of heritage matters related to works proposed by statutory undertakers and statutory agencies.</p>	<p>The Trust provides archaeological and conservation advice to the Council and other local authorities in Somerset in accordance with the National Planning Policy Framework (Department for Communities and Local Government, 2012), and successor frameworks or standards, and in accordance with relevant planning policies.</p> <p>The Somerset Archaeological Handbook was prepared and distributed to local authorities and partners in 2016. This provides the standard for undertaking archaeological works in Somerset.</p> <p><i>KPI – External requests: Archaeological and conservation advice (LAs) and Agri-environment scheme advice</i></p> <p>The Somerset HER, re-launched in September 2016 provides access to detailed information about more than 30,000 heritage features in Somerset.</p>
<p>S2.2.2</p> <p>The Trust will, as requested and reasonably possible, provide archaeological and conservation advice to the Diocese of Bath and Wells through the Diocesan Advisory Committee.</p>	<p>The HES provides archaeological and conservation advice to the Diocesan Advisory Committee of Bath and Wells. This advice is in line with best practice given by the Association of Diocesan and Cathedral Archaeologists, Historic England and the Church Building Council Guidance note on Archaeology. This is provided through attendance at meetings and on request.</p>
<p>S2.2.3</p> <p>The Trust will seek to work in partnership with other local authorities and other bodies including English Heritage to maintain a Heritage at Risk Register and to implement a monument management programme.</p>	<p>The Trust meets on a quarterly basis with Historic England. This meeting provides an opportunity to maintain the Heritage at Risk Register and agree a monument management programme.</p> <p>An active partnership is maintained with Somerset County Council to identify priorities matched against capital funding.</p>
S2.2.4	The Trust has a dedicated Officer maintaining and developing the Historic

<p>The Trust will provide and maintain a Somerset Historic Environment Record for the Council.</p>	<p>Environment Record. The Officer updates GIS files on behalf of Somerset County Council. The new Somerset HER was launched in September 2016.</p> <p>KPI – <i>Website visits: Historic Environment Record</i></p>
<p>S2.2.5</p> <p>The Trust will seek to protect heritage assets and work in partnership with the Council and district councils to that end.</p>	<p>The Trust provides conservation planning advice to SCC and District Councils. Income received from the District Councils for this service features in the income profile of the Trust.</p> <p>Number of archaeological and conservation advice requests received (LAs)</p>
<p>S2.2.6</p> <p>The Trust will undertake conservation area appraisals and management plans, working in partnership with the Council and district councils.</p>	<p>Conservation area appraisals and management plans are undertaken as required.</p>

Agreed Activities	Evidence / Reference / Supporting Document
S2.3. Somerset's heritage is well managed	
<p>S2.3.1</p> <p>The Trust will achieve archive accreditation under the Archive Accreditation Standard administered by The National Archives, and will maintain accreditation status under this and successor standards.</p>	<p>The application for Archive Service Accreditation was formally submitted in October 2016. The application was made jointly for both the Somerset and Devon Archive and Local Studies Services. The application was submitted within the timescale suggested by The National Archives.</p>
<p>S2.3.2</p> <p>The Trust will achieve museum accreditation under the Accreditation Standard administered by Arts Council England, and will maintain accreditation status under this and successor standards.</p>	<p>The Museum of Somerset and the Somerset Military Museum achieved full accreditation under the Arts Council England Scheme in December 2014 (numbers 815 and 816).</p> <p>Somerset Rural Life Museum achieved provisional accreditation pending completion of the refurbishment works (number 817).</p> <p>Weston Museum achieved provisional accreditation pending completion of the refurbishment and permanent displays (number 818).</p>
<p>S2.3.3</p> <p>The Trust will seek to operate a service in line with the Museums Association's Code of Ethics and the Archives and Records Association (UK & Ireland)'s Code of Conduct.</p>	<p>The Trust complies fully with the Museums Association's Code of Ethics and the Archives and Records Association (UK & Ireland)'s Code of Conduct. The Trust was awarded the Record Keeping Service of the Year award by the Archives and Records Association.</p>
<p>S2.3.4</p> <p>The Trust will seek to operate a service in line with the professional standards of the Institute for Archaeologists and the Institute of Historic Building Conservation.</p>	<p>Following an inspection visit, the Historic Environment and Estates Service of the Trust has been accepted as a Registered Organisation of the Chartered Institute for Archaeologists.</p>
<p>S2.3.5</p> <p>The Trust will provide sufficient staffing, in terms of numbers, qualifications, training and experience, to keep collections safe and make them available for public inspection.</p>	<p>The Senior Management review staffing levels to ensure services may continue to be operated at standards specified in the Collections Management Agreement and Grant Agreement.</p> <p>The Personnel Committee reviews staff turnover and retention levels on a</p>

	<p>quarterly basis.</p> <p>CPD requirements are identified at annual reviews for all staff involved with the organisation with appropriate training provided as required.</p> <p>New job opportunities are advertised in appropriate professional publications.</p>
<p>S2.3.6</p> <p>As agreed between the Trust and the Council from time to time, the Trust will fulfil the historic environment/heritage requirements of agreements between the Council and developers which the Council may in future enter into from time to time and the Trust shall receive appropriate benefits associated with those agreements.</p>	<p>Hinkley Point monitoring continues, on behalf of Somerset County Council.</p>

3. Somerset's heritage contributes to a sense of place and to the cultural economy

Agreed Activities	Evidence/Reference/Supporting Document
<p>S3.1</p> <p>The Trust will build strong relationships with funding bodies and strategic agencies regionally and nationally.</p>	<p>Annual meetings are held with HLF South West to discuss opportunities and mutual priorities.</p> <p>We have regular communications and meetings with Arts Council England.</p> <p>Quarterly meetings take place with Historic England.</p> <p>A good relationship is maintained with the regional representative of The National Archives.</p> <p>The Trust has been approached by the British Museum with a view to hosting the Portable Antiquities Scheme in Devon, in addition to the services managed in Somerset and Dorset.</p>

<p>S3.2</p> <p>The Trust will develop key partnerships in Somerset, including within the cultural and tourism sectors.</p>	<p>The Trust is represented as follows:</p> <ul style="list-style-type: none"> • Member of the Somerset Chamber of Commerce • VisitSomerset • Arts Taunton • Cultural Education Partnership <p>The full scale of partnership activity in the year is referenced in the Partnerships and major meetings part of the report in Section 3.</p>
<p>S3.3</p> <p>The Trust will provide leadership within the heritage sector in Somerset.</p>	<p>We provide services on a contractual basis to other local authorities and town councils as a part of our leadership role.</p> <p>The Trust advises on best practice within its areas of service delivery.</p> <p>We actively run the Museum Development programme in Somerset, funded by Arts Council England. We employ two Museum Development Officers who along with other Officers of the Trust provide leadership with advice and guidance to other organisations.</p> <p>The Trust is developing an application to become a National Portfolio Organisation with Arts Council England.</p>
<p>S3.4</p> <p>The Trust will, for the benefit of all, seek to contribute to cultural tourism and other economic and cultural activity related to heritage.</p>	<p>The Museum of Somerset is the number one attraction in the Taunton area according to TripAdvisor. It is one of the top 20 free attractions in the South West region (Visit England annual figures). The museum is a significant attraction for tourists in Somerset leading to wider economic benefits.</p> <p>Regular changing exhibitions at the Museum of Somerset ensure repeat visitors and responses to changing cultural interests.</p> <p>Qualitative data: <i>TripAdvisor rank for attractions in Taunton</i></p> <p>KPI – <i>Visits: The Museum of Somerset, Somerset Rural Life Museum, Brick</i></p>

	<p><i>and Tile Museum, Somerset Heritage Centre</i></p> <p>The Trust is collaborating in partnerships for cultural and economic development. Further detail is provided in the Partnerships and major meetings part of the report in Section 3.</p>
<p>S3.5</p> <p>The Trust will encourage participation through providing rewarding volunteer opportunities and experiences.</p>	<p><i>KPI – Volunteer numbers: Somerset Heritage Centre, The Museum of Somerset, Somerset Rural Life Museum, Brick and Tile Museum, Portable Antiquities, Historic Environment and Estates</i></p> <p><i>KPI – Volunteer hours: Somerset Heritage Centre, The Museum of Somerset, Somerset Rural Life Museum, Brick and Tile Museum, Portable Antiquities, Historic Environment and Estates</i></p>

Appendix B. Key Performance Indicators 2015-16

Group	Service Area / Indicator	Relevance to Agreed Activities	Q1	Q2	Q3	Q4	Total 2015-16	Group Total / Average	Total 2014-15	Variance	Notes
Volunteer Numbers (averages / month) Average / month: 175	Somerset Heritage Centre	S3.5	47	50	50	46	48	175.58	42	14.1%	The increase in volunteer numbers at the Somerset Heritage Centre was due to greater involvement opportunities arising from the Kenyon Archive project
	Devon Heritage Centre	D3.5	23	28	27	22	25		-	-	
	North Devon Record Office	D3.5	5	5	5	4	5		-	-	
	The Museum of Somerset	S3.5	75	73	71	75	74		81	-8.5%	
	Somerset Rural Life Museum	S3.5	-	-	-	-	-		-	-	
	Brick & Tile Museum	S3.5	6	8	7	7	7		-	-	
	Portable Antiquities	S3.5	3	4	4	5	4		-	-	
Historic Environment & Estates	S3.5	12	11	12	15	13	12	3.4%			
Volunteer Hours Total: 27,177	Somerset Heritage Centre	S3.5	2,146	2,773	2,188	2,126	9,233	27,177	8,779	5.2%	The reduction in volunteer activity at the Museum of Somerset reflects the lower visitor numbers. An exciting programme of events and activities is in preparation to take place at the Museum of Somerset. The growth of social media advertising is also expected to attract new visitors.
	Devon Heritage Centre	D3.5	799	1,119	798	714	3,430		-	-	
	North Devon Record Office	D3.5	116	138	118	84	456		-	-	
	The Museum of Somerset	S3.5	2,348	2,231	2,146	2,336	9,061		11,844	-23.5%	
	Somerset Rural Life Museum	S3.5	-	-	-	-	-		-	-	
	Brick & Tile Museum	S3.5	521	537	515	473	2,046		-	-	
	Portable Antiquities	S3.5	111	145	230	270	756		-	-	
Historic Environment & Estates	S3.5	702	184	548	762	2,196	2,215	-0.9%			
Website Visits (page views, not unique) Total: 715,338	swheritage.org.uk	S1.1.3	13,164	19,831	21,520	29,795	84,310	715,338	759,210	-5.8%	The variance is due to the move of the archive catalogues away from county council websites, which attract more residual browser traffic. The URLs will continue to be advertised and propagated through our networks.
	The Museum of Somerset	S1.1.3	34,189	42,738	33,721	40,257	150,905				
	Somerset Rural Life Museum	S1.1.3	-	-	-	-	-				
	Archives - Somerset	S1.1.3	80,902	53,156	7,224	11,750	153,032				
	Archives - Devon	D1.1.2, D1.1.2	41,088	47,843	38,810	37,937	165,678				
	Historic Environment Record	S1.1.3, S2.2.4	39,282	46,813	38,291	24,623	149,009				
Other (Heritage of Ile, etc.)	S1.1.3	4,299	3,303	2,188	2,614	12,404					
Archives Accessioned Total: 626	Somerset - Number	S2.1.4	67	98	73	83	321	626	369	-13.0%	The significant increase in volume is due to the receipt of a large number of magistrates records in Somerset.
	Somerset - Volume (m ³)	S2.1.4	2	3	2	15	22		9	157.7%	
	Devon - Number	D2.1.3	84	79	70	72	305		-	-	
	Devon - Volume (m ³)	D2.1.3	3	1	2	6	11		-	-	
Visits Total: 92,750	Somerset Heritage Centre (not searchroom)	S1.1.2, S3.4	1,215	2,431	2,442	1,909	7,997	92,750	7,219	10.8%	In 2014-15, two exhibitions had unusually high visitor numbers. The in year numbers are at expected levels and the figure remains notable and above the residual figures of previous years. Efforts to promote and diversify the appeal of the Museum of Somerset will continue.
	Somerset Heritage Centre (searchroom only)	S1.1.2, S3.4	1,349	1,416	1,207	1,209	5,181		5,636	-8.1%	
	Devon Heritage Centre	D1.1.1, D3.4	1,083	1,204	1,181	1,095	4,563		-	-	
	North Devon Record Office	D1.1.1	598	538	554	442	2,132		-	-	
	The Museum of Somerset	S1.1.1, S3.4	12,268	20,210	17,906	21,701	72,085		111,654	-35.4%	
	Somerset Rural Life Museum	S1.1.1, S3.4	-	-	-	-	-		-	-	
Brick & Tile Museum	S1.1.1, S3.4	94	334	192	172	792	652	21.5%			
Heritage Events Total: 595	Somerset Heritage Centre - events	S1.1.2, S1.1.3	17	28	16	14	75	595	54	38.9%	The reduction in event numbers at the museums reflects the difference in exhibitions. Overall figures across the Trust have risen.
	Somerset Heritage Centre - tours	S1.1.2	1	4	3	3	11		7	57.1%	
	Devon Heritage Centre	D1.1.1, D1.1.2	12	12	14	11	49		-	-	
	The Museum of Somerset	S1.1.1, S1.1.3	85	96	62	63	306		360	-15.0%	
	Somerset Rural Life Museum	S1.1.1, S1.1.3	-	-	-	-	-		-	-	
	Brick & Tile Museum	S1.1.1, S1.1.3	1	2	2	1	6		7	-14.3%	
	Historic Environment (inc. Hinkley Point)	S1.2.2	13	18	16	10	57		57	0.0%	
Portable Antiquities	S1.2.2	10	8	67	6	91	-	-			

Group	Service Area / Indicator	Relevance to Agreed Activities	Q1	Q2	Q3	Q4	Total 2015-16	Group Total / Average	Total 2014-15	Variance	Notes
People attending heritage events Total: 20,047	Somerset Heritage Centre - events	S1.1.2, S1.1.3	635	518	257	170	1,580	20,047	1,739	-9.1%	The slight overall increase is due to additional numbers being included in the reporting of statistics.
	Somerset Heritage Centre - tours	S1.1.2	9	50	37	34	130		97	34.0%	
	Devon Heritage Centre	D1.1.1, D1.1.2	154	145	178	546	1,023		-	-	
	The Museum of Somerset	S1.1.1, S1.1.3	2,706	3,564	2,182	3,922	12,374		13,531	-8.6%	
	Somerset Rural Life Museum	S1.1.1, S1.1.3	-	-	-	-	-		-	-	
	Brick & Tile Museum	S1.1.1, S1.1.3	12	201	34	22	269		122	120.5%	
	Historic Environment (inc. Hinkley Point)	S1.2.2	251	853	1,814	886	3,804		3,510	8.4%	
	Portable Antiquities	S1.2.2	415	97	162	193	867		-	-	
Formal and informal learning sessions	Informal activities - Somerset	S1.2.1	11	23	17	24	75	-	90	-16.7%	The reduction in informal sessions at museums reflects the difference in exhibitions and internal capacity. A new programming group is expected to result in more specific planning to diversify events and engage new staff to grow capacity.
	Informal activities - Devon	D1.2.1	-	-	-	-	-		-	-	
	Formal learning sessions - Somerset	S1.2.1	127	95	66	67	355		353	0.6%	
	Formal learning sessions - Devon	D1.2.1	-	-	-	-	-		-	-	
People attending formal and informal learning	People attending informal activities - Somerset	S1.2.1	721	2,269	1,496	3,043	7,529	-	9,942	-24.3%	The reduction in informal sessions at museums reflects the difference in exhibitions and internal capacity. A new programming group is expected to result in more specific planning to diversify events and engage new staff to grow capacity.
	People attending informal activities - Devon	D1.2.1	-	-	-	-	-		-	-	
	People attending formal learning - Somerset	S1.2.1	3,795	2,647	2,291	1,872	10,605		10,683	-0.7%	
	People attending formal learning - Devon	D1.2.1	-	-	-	-	-		-	-	
Archive Conservation	Document repairs - Somerset	S2.1.1	460	388	447	502	1,797	-	1,437	25.1%	
	Document repairs - Devon	D2.1.1	167	136	113	77	493		-	-	
	Exhibitions mounted - Somerset	S2.1.1	11	9	8	7	35		35	0.0%	
	Exhibitions mounted - Devon	D2.1.1	-	4	7	26	37		-	-	
External requests	Archaeological and conservation advice (LAs)	S2.2.1, S2.2.5	363	410	349	402	1,524	-	-	-	
	Agri-environment scheme advice - N.E.	S2.2.1	2	3	68	154	227		-	-	
	Archives Enquiries - Somerset	S1.1.2	868	768	920	975	3,531		-	-	
	Archives Research - Somerset	S1.1.2	81	97	89	116	383		-	-	
Complaints	General		-	-	-	-	-	7	-	-	
	Somerset Archives & Local Studies		-	1	-	2	3		-	-	
	Devon Archives and Local Studies		1	1	-	-	2		3	-	
	The Museum of Somerset		-	-	-	1	1		1	-	
	Somerset Rural Life Museum		1	-	-	-	1		-	-	
	Brick & Tile Museum		-	-	-	-	-		-	-	
	Historic Environment and Estates		-	-	-	-	-		-	-	

Appendix C.

Key Performance Indicators – Somerset 2015-16

Service Area / Indicator	Relevance to Agreed Activities	Q1	Q2	Q3	Q4	Total 2015-16	Total 2014-15	Variance
Volunteer Numbers								
Somerset Heritage Centre	S3.5	141	151	150	139	581	509	14.1%
The Museum of Somerset	S3.5	224	220	214	226	884	966	-8.5%
Somerset Rural Life Museum	S3.5	-	-	-	-	-	-	-
Brick & Tile Museum	S3.5	18	23	22	22	85	-	-
Portable Antiquities	S3.5	10	11	12	14	47	-	-
Historic Environment & Estates	S3.5	37	33	37	46	153	148	3.4%
Volunteer Hours								
Somerset Heritage Centre	S3.5	2,146	2,773	2,188	2,126	9,233	8,779	5.2%
The Museum of Somerset	S3.5	2,348	2,231	2,146	2,336	9,061	11,844	-23.5%
Somerset Rural Life Museum	S3.5	-	-	-	-	-	-	-
Brick & Tile Museum	S3.5	521	537	515	473	2,046	-	-
Portable Antiquities	S3.5	111	145	230	270	756	-	-
Historic Environment & Estates	S3.5	702	184	548	762	2,196	2,215	-0.9%
Website Visits (page views, not unique)								
swheritage.org.uk	S1.1.3	13,164	19,831	21,520	29,795	84,310	759,210	-15.5%
The Museum of Somerset	S1.1.3	34,189	42,738	33,721	40,257	150,905		
Somerset Rural Life Museum	S1.1.3	-	-	-	-	-		
Archives - Somerset	S1.1.3	80,902	53,156	7,224	11,750	153,032		
Historic Environment Record	S1.1.3, S2.2.4	39,282	46,813	38,291	24,623	149,009		
Other (Heritage of Ille, etc.)	S1.1.3	4,299	3,303	2,188	2,614	12,404		
Archives Accessioned								
Somerset - Number	S2.1.4	67	98	73	83	321	369	-13.0%
Somerset - Volume (m ³)	S2.1.4	2	3	2	15	22	9	157.7%
Visits to Sites								
Somerset Heritage Centre (not searchroom)	S1.1.2, S3.4	1,215	2,431	2,442	1,909	7,997	7,219	10.8%
Somerset Heritage Centre (searchroom only)	S1.1.2, S3.4	1,349	1,416	1,207	1,209	5,181	5,636	-8.1%
The Museum of Somerset	S1.1.1, S3.4	12,268	20,210	17,906	21,701	72,085	111,654	-35.4%
Somerset Rural Life Museum	S1.1.1, S3.4	-	-	-	-	-	-	-
Brick & Tile Museum	S1.1.1, S3.4	94	334	192	172	792	652	21.5%
Heritage Events								
Somerset Heritage Centre - events	S1.1.2, S1.1.3	17	28	16	14	75	54	38.9%
Somerset Heritage Centre - tours	S1.1.2	1	4	3	3	11	7	57.1%
The Museum of Somerset	S1.1.1, S1.1.3	85	96	62	63	306	360	-15.0%
Somerset Rural Life Museum	S1.1.1, S1.1.3	-	-	-	-	-	-	-
Brick & Tile Museum	S1.1.1, S1.1.3	1	2	2	1	6	7	-14.3%
Historic Environment	S1.2.2	13	18	16	10	57	57	0.0%
Portable Antiquities	S1.2.2	10	8	67	6	91	-	-
People attending heritage events								
Somerset Heritage Centre - events	S1.1.2, S1.1.3	635	518	257	170	1,580	1,739	-9.1%
Somerset Heritage Centre - tours	S1.1.2	9	50	37	34	130	97	34.0%
The Museum of Somerset	S1.1.1, S1.1.3	2,706	3,564	2,182	3,922	12,374	13,531	-8.6%
Somerset Rural Life Museum	S1.1.1, S1.1.3	-	-	-	-	-	-	-
Brick & Tile Museum	S1.1.1, S1.1.3	12	201	34	22	269	122	120.5%
Historic Environment	S1.2.2	251	853	1,814	886	3,804	3,510	8.4%
Portable Antiquities	S1.2.2	415	97	162	193	867	-	-
Formal and informal learning sessions								
Informal activities - Somerset	S1.2.1	11	23	17	24	75	90	-16.7%
Formal learning sessions - Somerset	S1.2.1	127	95	66	67	355	353	0.6%
Formal and informal learning - attendees								
People attending informal activities - Somerset	S1.2.1	721	2,269	1,496	3,043	7,529	9,942	-24.3%
People attending formal learning - Somerset	S1.2.1	3,795	2,647	2,291	1,872	10,605	10,683	-0.7%
Archive Conservation								
Document repairs - Somerset	S2.1.1	460	388	447	502	1,797	1,437	25.1%
Exhibitions mounted - Somerset	S2.1.1	11	9	8	7	35	35	0.0%
External requests								
Archaeological and conservation advice (LAs)	S2.2.1, S2.2.5	363	410	349	402	1,524	-	-
Agri-environment scheme advice - N.E.	S2.2.1	2	3	68	154	227	-	-
Archives Enquiries - Soemrset	S1.1.2	868	768	920	975	3,531	-	-
Archives Research - Somerset	S1.1.2	81	97	89	116	383	-	-
Complaints								
General		-	-	-	-	-	-	-
Somerset Archives & Local Studies		-	1	-	2	3	-	-
The Museum of Somerset		-	-	-	1	1	1	-
Somerset Rural Life Museum		1	-	-	-	1	-	-
Brick & Tile Museum		-	-	-	-	-	-	-
Historic Environment and Estates		-	-	-	-	-	-	-

Appendix D. Summary of visitor surveys and online in 2015-16

The Museum of Somerset – 250 responses obtained

- Thursday 10 March 2016 – 121 questionnaires
- Tuesday 9 to Thursday 11 August 2016 – 129 questionnaires

Please rate your experience of the shop

N/A	Poor	Average	Good	Excellent	Prefer not to say
58	1	19	90	74	2
23.8%	0.4%	7.8%	36.9%	30.3%	0.8%

The shop continues to perform strongly at the Museum of Somerset and sales figures have been positive. Of the users who rated the shop, 89% thought it was good or excellent. The manager of the museum continues to refine and add to the diversity of the stock, retaining strong sellers but ensuring new items are added.

Please rate your experience of the café

N/A	Poor	Average	Good	Excellent	Prefer not to say
94	3	6	70	68	2
38.7%	1.2%	2.5%	28.8%	28.0%	0.8%

These results show that nearly 40% of respondents do not visit the café as a part of their visit. Of those that do use the cafe, 94% rate it as good or excellent. The café has enjoyed strong sales during the year and also attracts a good number of users who do not visit the museum, but appreciate the ambience of the setting.

Please rate your experience of the exhibition gallery

N/A	Poor	Average	Good	Excellent	Prefer not to say
40	2	8	95	99	0
16.4%	0.8%	3.3%	38.9%	40.6%	0.0%

The exhibition gallery achieves a 95% approval rating from respondents. The number of temporary exhibitions which take place is greater than the number of surveys undertaken so the figures reflect specific exhibitions, rather than the use of the space overall. It is very encouraging that of the respondents, 84% visited the temporary exhibition despite its separation from the main areas of the museum.

Please rate your overall experience at the Museum of Somerset

N/A	Poor	Average	Good	Excellent	Prefer not to say
6	0	5	86.5	153.5	0
2.4%	0.0%	2.0%	34.5%	61.2%	0.0%

This is an extremely positive result with nearly two thirds of respondents rating the museum as excellent. The museum staff are extremely proud of their customer service and are knowledgeable about the temporary and permanent exhibits. The aim is to retain this reputation and to achieve a higher proportion of ‘excellent’ reviews. A continued commitment to staff training and job shadowing will help to achieve this.

Gender

Male	Female	Transgender	Prefer not to say
87	144	0	1
37.5%	62.1%	0.0%	0.4%

The proportion of women attending the Museum of Somerset may in part be due to the fact that surveys were undertaken on weekdays and the museum is popular with pre-school children. The March date was outside of school holidays, whilst the August dates were during school holidays. The museum is a popular destination for parents, carers and grandparents seeking activities for children, both of pre-school age and school age. Different days of the week will be selected for future surveys to provide a comparison of gender balance.

What is your age group?

0-15 years	16-24 years	25-44 years	45-64 years	65+ years	Prefer not to say
27	14	66	62	61	1
11.7%	6.1%	28.6%	26.8%	26.4%	0.4%

There is a good distribution of attendance across the age groupings. There is a noticeable dip in the number of people attending aged 16-24, but this is a somewhat predictable result. Nationally, it is recognised that engaging with this age group is challenging. One of the proposed approaches to address the imbalance is to invest in the development of resources to support self-guided visits by secondary schools and to provide taught sessions linked to the PSHE curriculum. This is a component of the NPO bid submitted to Arts Council England in January 2017. If successful, the funding will start from 2018.

The combined figure for the group 0 to 24 is 17.8% which is more in line with the other groupings.

Do you consider yourself to have a disability of long-term health condition?

Yes	No	Prefer not to say
21	178	14
9.9%	83.6%	6.6%

The Office for National Statistics have calculated that in 2011, 8.3% of the population of England had a disability and that this number had fallen since 2001. The Museum of Somerset is an accessible building and it is encouraging that the number of visitors who class themselves to have a disability is higher than the national average at 9.9%. This would suggest that the accessibility of the museum is recognised and also indicates that this group is an audience in its own right. Further positive marketing and staff training is planned to ensure that visitors of all abilities are fully catered for.

If yes, what is the nature of your disability or long-term health condition?

Mobility	Hearing	Learning	Mental Health	Physical	Visual	Prefer not to say
8	5	2	2	9	0	9
22.9%	14.3%	5.7%	5.7%	25.7%	0.0%	25.7%

The statistics presented demonstrate the array of factors that visitors have listed as being a disability. In some cases, more than one box was selected. It is noticeable that there were no visual disabilities recorded. The Museum of Somerset is a tactile destination with many multi-sensory experiences. A potential future project may be to review opportunities for how the museum might be made more accessible to people with visual disabilities.

A review of opening times is proposed, with the aim of introducing restricted access quiet times, to be exclusively available to families and carers who support children or adults with autism and other developmental learning conditions.

What is your ethnic group?

White	Mixed / Multiple Ethnic Groups	Asian	Black / African / Caribbean	Other Ethnic Group	Prefer not to say
194	2	1	2	0	13
91.5%	0.9%	0.5%	0.9%	0.0%	6.1%

The ethnic profile of visitors to the Museum of Somerset is broadly in line with the ethnic profile of Somerset based on the 2011 census. This lists the population of Somerset as being 94.6% white British. The figures however show a lack of diversity when compared with the national average of 80.1% and the array of distribution across different ethnic groups. The figures are likely to differ quite significantly from the ethnic profile of populations in Taunton.

Different methods are being considered to increase the diversity of visitors. There is an intellectual barrier to remove, relating to the perception of museums. A programme of touring is proposed through the NPO bid, to provide access to museum collections in settings which do not have the same preconception attached to them.

The ongoing extensive learning programme will also engage with a proportionately higher number of children with a greater ethnic diversity. It is known that children’s engagement with school visits is a significant driver for family visits.

Social Media Reviews

	1 Star	2 Stars	3 Stars	4 Stars	5 Stars
Museum of Somerset – Facebook	0	0	0	4	27
Museum of Somerset – TripAdvisor	1	1	5	44	125
Somerset Heritage Centre – TripAdvisor	0	0	0	1	0
Total Reviews in Year	1	1	5	49	152
Previous year	0	1	6	58	130

The Museum of Somerset received its first one star review on TripAdvisor during the year. Whilst this was disappointing, the review was not related to the museum exhibits but rather was based on the noise of some children. The museum welcomes people of all ages and especially children, to engage them with heritage from a young age.

Reviewing the year as a whole across all sites which have attracted a visitor rating, the average score has improved marginally since the previous year. It is evident that the Museum of Somerset in particular has achieved a markedly higher number of five star reviews in the year, lifting the average rating from 4.62 to 4.68 out of 5.

Appendix E. Compliments and Complaints

Site Name and Source	Complaints Resolved See detail below	Complaints Unresolved	Positive Feedback	Neutral	Comments
Devon Heritage Centre – by email & letter	2	0	457	0	
Devon Heritage Centre – comments book, reception	0	0	108	0	4 comments about parking and Find My Past (with compliments)
Devon Heritage Centre – comments book, quiet room	0	0	36	0	5 comments about aircon, Find My Past and solvent smell
The Museum of Somerset – comments book, reception	1	0	94	10 ⁽¹⁾	8 comments making suggestions about objects to display
The Museum of Somerset – Imprints Exhibition (Nov, Dec)	0	0	169	0	
Victor Ambrus Exhibition	0	0	240	0	
Pirates! Exhibition	0	0	228	7 ⁽²⁾	
Somerset Heritage Centre – by email & letter	3	0	644	0	
Somerset Heritage Centre – comments book, reception	0	0	19	0	
Somerset Rural Life Museum – letter	1	0	0	0	
TOTALS	7	0	1,995	17	17

(1) 7 relating to font size of captions and lighting, particularly in the Military Museum. The lighting issue is being resolved through the installation of a new LED system.

2 about the noise of children

1 contesting which Edington was of relevance to the Battle of Sedgemoor

(2) All relating to charging

Complaints

Month	Nature of Complaint	Outcome
Devon Heritage Centre 25 November 2015	Dislike of the use of a stock response email detailing sources of information. Complainant abusive by email.	Responded but no reply. Apology sent along with full detailed response to enquiry
Somerset Rural Life Museum January 2016	Neighbour to museum, about the sight-line from top floor of new glass section of building into back garden and house.	Resolved. It was agreed that the sight-line would be obscured through the installation of an opaque graphic on the window.
Devon Heritage Centre 15 February 2016	The application of a £10 fee for search	Responded but no reply. Explanation of the reason for the fee.
Somerset Heritage Centre March 2016	The costs of photo licences being too high.	Responded but no reply. Explanation of the reason for the fee.
Somerset Heritage Centre August 2016	Two complaints about the Monday closure of the searchroom from representatives of the same local history group.	Resolved. A detailed response was provided and the complainant acknowledged the validity of the reasons for the decision.
The Museum of Somerset September 2016	Anonymous complaint about a volunteer making a visitor feel 'uncomfortable'.	Investigated. CCTV checked and supervising staff questioned. Unsubstantiated, but volunteer received training about customer services.

Appendix F. Meeting Schedules

Two meetings of the **Advisory Forum** have taken place:

- 7 March 2016
- 5 September 2016

The process to formalise how **repairs and maintenance planning** is to be agreed between the Trust and Somerset County Council (SCC) has been reviewed. An active process of collaboration is now in place between SCC and the Premises Manager at the Trust.

The **Business Plan and Annual Budget** for the period 1 November 2016 to 31 October 2017 Trust was formally approved by the Board of Trustees on 13 October 2016.

Various meetings with **SANHS** have taken place in relation to their picture collection and planned conservation work.

The annual meeting of the **North Somerset** panel took place on 15 April.

The annual meeting with **Torbay Unitary Authority** took place on 4 April, with a further year of funding confirmed.

Two outcomes meetings took place with representatives of Somerset County Council and Devon County Council:

- **Annual Outcomes meeting** – 9 March
- **6-month review meeting** – 15 June

The first set of **audited accounts** was formally submitted on 31 August.

Update meetings with Somerset County Council to discuss Agreed Activities, Heritage Collections and Properties were held in February, April and October.

Regular meetings have taken place with **Devon County Council** to progress the completion of the lease for Great Moor House and the North Devon Record Office Project.

Regular meetings have taken place at which Somerset County Council have been present to hear about progress with the **Somerset Rural Life Museum** development.

The monitoring process for work undertaken relating to **Hinkley Point** has been through meetings and budget reporting:

- Somerset County Council progress and public realm works – 25 February, 21 June, 12 September

Appendix G. Financial summary

The summary below is the forecast out-turn for the Trust in the year 1 November 2015 to 31 October 2016. The figures are **provisional** as the final audit and accounts preparation is not scheduled to be fully complete until April 2017.

Expenditure	Budget	Actuals	Variance
Staffing costs – Core	£2,087,179	£2,152,350	3.03%
Non-staffing costs and commitments – Core	£970,425	£1,092,477	12.58%
Staffing costs – non-core projects	£221,164	£221,164	0%
Non-staffing costs – non-core projects	£232,396	£232,396	0%
Reserves, capital, development fund	£96,176	£98,698	2.62%
Restricted income to year 2		£313,310	-
Total Expenditure / Commitments		£4,110,395	

Income	Budget	Actuals	Variance
Core Income - Somerset County Council	£1,791,224	£1,740,507	-0.03%
Core Income - Devon County Council	£347,910	£347,910	0%
Unrestricted external income	-	£787,576	-
Restricted external income	-	£1,234,402	-
Total Income (including forward projects)		£4,110,395	

Appendix H. Grant Agreement Budget

The figures presented below are the core budget for the Trust at the point of vesting on 1 November 2014. External or additional project costs are not included within these figures.

Source	Year 1	Year 2	Year 3	Year 4	Year 5
Somerset County Council	1,769,380	1,741,224	1,641,274	1,662,423	1,626,687
Devon County Council	347,358	347,910	345,451	350,095	354,846
Other Sources	779,667	791,667	914,667	883,667	897,667
Total	2,896,405	2,880,801	2,901,392	2,896,185	2,879,200