

## South West Heritage Trust Update

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Cabinet Member: Councillor David Hall,

Division and Local Member: N/A

### 1. Summary

- 1.1. As requested by the Scrutiny Committee, this report provides an update about the South West Heritage Trust following its third year of operation from 1 November 2016 to 31 October 2017. The report highlights the successful delivery of Agreed Activities specified within the Grant Agreement to ensure that Somerset's rich heritage is better protected, celebrated and made available as well as demonstrating financial savings to Somerset County Council.

### 2. Issues for consideration / Recommendations

- 2.1. To consider and comment on the annual report of the South West Heritage Trust pertaining to the third year of operation from 1 November 2016 – 31 October 2017.

### 3. Background

- 3.1. The South West Heritage Trust (the Trust) came into being on 1 November 2014 as an independent company limited by guarantee with charitable status. A subsidiary trading company was also formed. The Trust delivers the Archives and Local Studies Services formerly provided by Somerset and Devon County Councils, and Somerset's Museums and Historic Environment Services. The Trust are also contracted to provide Archive and Museums Services to North Somerset Council.

The Trust is led by a Board of twelve Trustees including SCC and DCC nominees; Cllr Anna Groskop is Somerset County Council's representative on the Board of Trustees.

- 3.2. The principal legal agreements between the County Councils and the Trust are the Transfer Agreements, Grant Agreements and Collections Management Agreements. The Grant Agreements with SCC and DCC provide a 5-year funding agreement and define a number of outcomes that the Trust is committed to achieve. The Trust sets out how it will deliver these outcomes through a rolling three-year business plan, guided by its vision to "celebrate and protect our rich heritage, helping everyone to enjoy it now and in the future".

- 3.3.** The aim of establishing the Trust was to provide a resilient future for the heritage services of both Somerset and Devon, and in so doing to enable us to better protect, celebrate and make available the rich heritage of Somerset and Devon, ensuring its continued contribution to our economy and cultural life.
- 3.4.** The formation of the Trust has already delivered demonstrable benefits to all contracting parties including the complete refit and reopening of the Somerset Rural Life museum, the Trust's Archive Service receiving an Excellence Award for its pioneering work in Devon and the major refurbishment of Weston museum in North Somerset.

#### **4. Key achievements during year 3 (1 November 2016 – 31 October 2017)**

- 4.1** Key achievements in the third year of operation include the following examples:

##### **Museums Service**

- Somerset Rural Life Museum re-opened to the public on 3 June 2017. The museum has been fully refurbished and now includes new visitor spaces and facilities, new permanent museum displays and much-improved visitor access.
- Weston Museum re-opened on 26 August 2017 following major refurbishment. The Trust was responsible for the interpretive and curatorial elements of the project.
- A series of wide-ranging temporary exhibitions concluded with the spotlight loan of a portrait of Henry VII from the National Portrait Gallery, the earliest portrait in the national collection.
- The Museum of Somerset continues to be one of the most highly regarded museums in the South West and consistently attracts very positive reviews; e.g. it has a Trip Advisor average of 4.74 out of 5 in the year from 109 reviews.

##### **Somerset Archives and Local Studies**

- The Somerset and Devon Archive Services attained accreditation from The National Archives following a thorough assessment process. This marks the first occasion that two jointly-managed shire-county services have been accredited under the Accreditation Scheme.
- The South West Heritage Trust received an Excellence Award for its pioneering work in transforming Archive Services. The Archives and Records Association, the leading professional body for archivists, conservators and records managers in the United Kingdom and Ireland, was making the Excellence Awards for the first time. The South West Heritage Trust received the award for Record-Keeping Service of the Year.
- Following major involvement from many members of the Archives and Local Studies team, the Somerset section of the Know Your Place map-based website was launched. An exhibition to celebrate

and showcase the project was held at Taunton Library as part of a touring programme.

### **Historic Environment and Estates**

- An estimated 500 people attended an open day on 12 March 2017 to hear about archaeological discoveries during the recent excavation at the Beckery Chapel site in Glastonbury.
- A new edition of the Archaeological Handbook has been published by the Trust. The Handbook is intended to provide detailed advice to the public and others concerning archaeology and the planning system.
- A total of 436 Countryside Stewardship consultations from DEFRA were dealt with for Somerset during the main consultation period from July to September 2017, the third highest number of applications for any county in England.
- A total of 1,288 requests for archaeological and conservation advice were received from local authorities, averaging 5.8 per day.
- The Service led the rescue excavation of a Roman lead cistern found during September 2017 at Trudoxhill in the north-east of the county. The cistern is a very rare object, probably with ritual (Christian) significance, and has now been added to the museum collections.

### **Lifelong Learning**

- Formal learning remained a very popular offer with nearly 10,000 children attending 374 sessions delivered at schools and museums throughout the year.
- Subscriptions to the Formal Learning Service for the 2017/18 academic year remained strong and more schools subscribed than in the previous year.
- The number of people attending informal learning events increased marginally compared to the previous year. In total 7,682 people attended 82 events.
- Reminiscence sessions were held throughout the year. Special sessions were held at Calway House in Taunton during Dementia Awareness Week (14–20 May).

### **Exhibitions, Events and Outreach**

The public programme of exhibitions and events is central to the activities of the Trust. It offers many opportunities for engaging with members of the public. A total of 430 events were recorded across all areas of the Trust during the year, reaching more than 16,000 people. Some highlights included the following:

- ‘A Fragile Beauty: Art on the Blackdown Hills 1909-1925’ was a major loan exhibition highlighting the art of the Camden Town Group in Somerset. It was the first major exhibition at the Museum of Somerset to rely entirely on loans and included Spencer Gore’s ‘Applehayes’ from

the Ulster Museum, and Charles Ginner's 'Landscape with Farmhouse' from Manchester Art Gallery. It was extremely successful.

- 'Rhyme Around the World' was a colourful, multi-sensory exhibition from the National Centre for Children's Books and engaged family audiences during the summer holidays.
- 'Colours of Exile: The Art of Hans Schwarz' explored the life and work of the internationally renowned Austrian artist Hans Schwarz, who settled in Stogursey after fleeing Nazi Germany.
- The loan of the portrait of Henry VII from the National Portrait Gallery continued the very successful programme of spotlight loans which began in 2015 with the Alfred Jewel.
- A talk was given by the politician David Owen (Lord Owen of the City of Plymouth) at the Museum of Somerset as part of the Taunton Literary Festival.
- Two talks by popular historian Dr Lucy Worsley were given as a result of a partnership with the Tacchi-Morris Arts Centre.

### **Collections Care and Acquisitions**

- A three-quarter length portrait of Tom Poole (1766-1837) has kindly been given to the museums collections and will be displayed at the Museum of Somerset.
- Extensive conservation work has been completed by specialist conservators on several paintings now displayed at the Somerset Rural Life Museum. Generous financial assistance from Somerset Archaeological and Natural History Society supported some of the work.
- A Roman Lead Ingot found in Westbury-sub-Mendip in May 2016 was acquired at auction on 22 March 2017. The ingot, derived from the Roman lead mines on the Mendip Hills, can be dated to the years AD 161 to AD 169. It bears an inscription with the names of the joint emperors Antoninus (Marcus Aurelius) and Lucius Verus.
- Evelyn Waugh's ear trumpet was acquired at auction on 30 March 2017. It belonged to Waugh during his later years at Combe Florey, where he died in 1966. It is to be displayed in the 'Creating' gallery at Somerset Rural Life Museum.

**4.2** Full reports of the activities of the Trust during the third year can be found in the Background Papers

**4.3** Volunteers are central to the success of the Trust and its activities. Throughout the year, the Trust was supported by 206 volunteers across all areas of delivery. 30,265 volunteer hours were recorded, which is the equivalent of 4,000 days or more than 18 full-time members of staff.

**4.4** The new ICT system, which launched in Somerset in October 2016, was successfully implemented during February 2017, meaning that the Trust is now independent of both county councils in respect of its ICT provision.

**4.5** The third formal Annual Report and Outcomes meeting took place on 11 June 2018 when both Somerset and Devon Commissioners met with the

Chief Executive, Business Manager and Head of Archives Services. The Annual Report is available as a background paper.

- 4.6 Staffing** – Notable changes to staffing included the retirement of Steve Minnitt, Head of Museums for the Trust. Steve joined the Museums Service in 1974 and had led it since 2004. He oversaw the creation of the Museum of Somerset and Somerset Rural Life Museum.
- 4.7** The number of Full Time Equivalent (FTE) staffing levels across the Trust remained effectively unchanged at 77.77 (77.75 in year 2 of operation).
- 4.8 Board of Trustees** – Meetings of the Board of Trustees took place on 12 January, 20 April, 13 July and 12 October 2017.
- 4.9** On 14 November 2016, the Board unanimously agreed that Peter Beacham OBE and Sam Hunt be appointed as Trustees with effect from 1 January 2017.
- 4.10** Following interviews on 17 January to select new trustees the Board unanimously accepted a recommendation that Prof Henry French, Nicola Nuttall and Anthony Smallwood should be appointed trustees. The first retirement meeting for Trustees took place on 20 April 2017 at which David Sekers and Todd Gray retired from the Board.
- 4.11** Following the County Council elections on 4 May 2017, Cllr David Hall stood down as a trustee because of his new cabinet responsibilities. He was replaced by Cllr Anna Groskop.

## **5. Consultation and engagement**

- 5.1.** Responsibility for consultation regarding Heritage Services lies with the Trust.
- 5.2.** An Advisory Forum meets twice a year and is an increasingly successful vehicle for ideas and feedback. A refresh of the membership of the Forum is proposed in 2018.
- 5.3.** Customer feedback from visitor surveys, comments books, emails, social media reviews and other correspondence are collated. During the reporting year only a single complaint, but nearly 1,500 compliments were received
- 5.4.** The Staff Forum met six times during the year and discussed matters including the approval of policies, changes to operational procedures, training and CPD, the annual pay award and safeguarding.

## **6. Financial and Contract Update**

- 6.1.** The status of the Trust as an independent charitable body continues to present new opportunities for income generation that are unavailable to County Councils. These include the ability to bid for grants available only to charities and to achieve increased donations, as well as the economic benefits of charitable status such as tax relief and exemptions. The subsidiary trading company enables additional income.

- 6.2.** The initial 5-year budget of £8,441k agreed with the Trust has been revised to take into account an MTFP saving agreed in February 2016 for year 3 onwards. Agreed contributions from Somerset County Council are shown below. Devon County Council contributions for Archives and Local Studies are shown in italics.

	Year 1 (Nov 14 – Oct 15)	Year 2 (Nov 15 – Oct 16)	Year 3 (Nov 16 – Oct 17)	Year 4 (Nov 17 – Oct 18)	Year 5 (Nov 18 – Oct 19)
Initial	£1,769,300	£1,741,224	£1,641,274	£1,662,424	£1,626,688
<i>DCC</i>	<i>(£347,358)</i>	<i>(£347,910)</i>	<i>(£345,451)</i>	<i>(£350,095)</i>	<i>(£354,846)</i>
MTFP agreed	£1,769,300	£1,741,224	£1,626,274	£1,632,424	£1,596,688
Variance	n/a	n/a	-£15,000	-£30,000	-£30,000

The reduction in SCC contributions across the 5-year period reflects the anticipated income profile tested through the non-charging/charging modelling carried out by Stuart Davies Associates prior to the detailed financial negotiations. In particular, the significant drop in County Council funding from Year 3 onwards is due to the anticipated income from Somerset Rural Life Museum from when it reopened in June 2017.

Following the ‘soft’ launch of the Rural Life Museum on 3 June 2017 the museum is in the process of steadily building its audience in conjunction with a targeted marketing campaign.

The Trust’s audited accounts are available on the Trust’s and Charity Commission website.

The current Grant Agreement with the South West Heritage Trust expires on 31 October 2019. Initial discussions have been held between officers of the Trust and Somerset County Council regarding the Grant arrangements beyond the expiry of the current agreement.

## **7. Background papers**

- 7.1.** Appendix A – SW Heritage Trust Annual Report

**Note** For sight of individual background papers please contact the report author.