

# Climate Emergency and Sustainability Policy Development and Scrutiny Panel

**Date: Monday, 6th March, 2023**

**Time: 4.00 pm**

**Venue: Council Chamber - Guildhall, Bath**

**Councillors:** Karen Walker, Joel Hirst, Shelley Bromley, Paul Crossley,  
Grant Johnson, Ruth Malloy, Lisa O'Brien, Ryan Wills and Dr Kumar



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## NOTES:

1. **Inspection of Papers:** Papers are available for inspection as follows:

Council's website: <https://democracy.bathnes.gov.uk/ieDocHome.aspx?bcr=1>

Paper copies are available for inspection at the Guildhall - Bath.

2. **Details of decisions taken at this meeting** can be found in the minutes which will be circulated with the agenda for the next meeting. In the meantime, details can be obtained by contacting as above.

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**Climate Emergency and Sustainability Policy Development and Scrutiny Panel - Monday,  
6th March, 2023**

**at 4.00 pm in the Council Chamber - Guildhall, Bath**

**A G E N D A**

1. WELCOME AND INTRODUCTIONS

2. EMERGENCY EVACUATION PROCEDURE

The Chair will draw attention to the emergency evacuation procedure as set out under Note 6.

3. APOLOGIES FOR ABSENCE AND SUBSTITUTIONS

4. DECLARATIONS OF INTEREST

At this point in the meeting declarations of interest are received from Members in any of the agenda items under consideration at the meeting. Members are asked to indicate:

- (a) The agenda item number in which they have an interest to declare.
- (b) The nature of their interest.
- (c) Whether their interest is **a disclosable pecuniary interest** or **an other interest**,  
(as defined in Part 4.4 Appendix B of the Code of Conduct and Rules for Registration of Interests)

Any Member who needs to clarify any matters relating to the declaration of interests is recommended to seek advice from the Council's Monitoring Officer or a member of his staff before the meeting to expedite dealing with the item during the meeting.

5. TO ANNOUNCE ANY URGENT BUSINESS AGREED BY THE CHAIRMAN

6. ITEMS FROM THE PUBLIC OR COUNCILLORS - TO RECEIVE STATEMENTS, PETITIONS OR QUESTIONS RELATING TO THE BUSINESS OF THIS MEETING

At the time of publication no notifications had been received.

7. MINUTES (Pages 7 - 14)

8. HERITAGE SERVICES BUSINESS PLAN 2023-2027 (Pages 15 - 46)

9. CABINET MEMBER UPDATE

The Cabinet Member will update the Panel on any relevant issues. Panel members may ask questions on the update provided.

The Committee Administrator for this meeting is Michaela Gay who can be contacted on 01225 394411.

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**BATH AND NORTH EAST SOMERSET**

**MINUTES OF CLIMATE EMERGENCY AND SUSTAINABILITY POLICY DEVELOPMENT AND SCRUTINY PANEL MEETING**

Monday, 16th January, 2023

Present:- **Councillors** Karen Walker, Joel Hirst, Shelley Bromley, Paul Crossley, Grant Johnson, Ruth Malloy, Lisa O'Brien, Ryan Wills and Dr Kumar

**59 WELCOME AND INTRODUCTIONS**

The Chair welcomed everyone to the meeting.

**60 EMERGENCY EVACUATION PROCEDURE**

The Democratic Services Officer drew attention to the emergency evacuation procedure.

**61 APOLOGIES FOR ABSENCE AND SUBSTITUTIONS**

There were no apologies for absence or substitutions.

**62 DECLARATIONS OF INTEREST**

There were none.

**63 TO ANNOUNCE ANY URGENT BUSINESS AGREED BY THE CHAIRMAN**

There was none.

**64 ITEMS FROM THE PUBLIC OR COUNCILLORS - TO RECEIVE STATEMENTS, PETITIONS OR QUESTIONS RELATING TO THE BUSINESS OF THIS MEETING**

Nicolette Boater made a statement to the panel regarding the item on 'Climate Annual Report & Ecological Emergency Action Plan' a copy of which is attached to these minutes. There were no factual questions from the Panel in relation to the statement. Cllr Warren agreed to meet Nicolette to discuss the points she raised in further detail.

Cllr Hardman submitted a question regarding Odd Down Park and Ride. The question and answer were circulated to Panel members in advance of the meeting and are attached as an appendix to these minutes.

**65 MINUTES**

The Panel confirmed the minutes of the previous meeting as a true record and they were duly signed by the Chair.

## 66 CLIMATE EMERGENCY ANNUAL REPORT AND ECOLOGICAL EMERGENCY ACTION PLAN

Cllr Warren, Cabinet Member for Climate and Sustainable Travel, introduced the item and drew attention to the progress and achievements over the last year as detailed in the Climate Emergency Annual Report and the new Ecological Emergency Action Plan.

Jane Wildblood, Strategic Manager: Climate & Environmental Sustainability, gave a presentation on the Climate Emergency Annual Report which covered the following:

- Climate Dashboard 2022
- Climate Action: Progress in Buildings
- Climate Action: Progress in Transport
- Climate Action: Progress in Renewable Energy
- A Focus on Achievements
- Community Engagement Highlights
- Route Map Projected Milestones 2023-2024
- 2023-24 Key Climate Actions
- Renewable Energy Focus:
- Acceleration of renewable energy delivery
- Climate Action & achieving net zero carbon 2030: Our asks of central government

Panel members commented and asked questions as follows (*Officer or Cabinet Member response shown in italics*):

Cllr Crossley asked the following questions:

- (1) How could Bath & North East Somerset Council (B&NES) encourage the downward trend in private car journeys which had started during the Covid pandemic? *This was an ongoing challenge for both the Government and local authorities as car journeys had started to return to pre-pandemic levels. B&NES was looking at investing in infrastructure as well as other options such as converting Park and Ride sites into multi modal interchanges and workplace parking levies.*
- (2) Was more information available on the Government's timescale for requiring Houses in Multiple Occupation (HMOs) to have Energy Performance Certificates (EPC) C rating and minimum energy efficiency standard (MEES) requirements EPC D rating. Was there a risk that landlords would not make the required improvements? *The target date was this year and the MEES requirement would apply to all types of other buildings being let. There would be no public money available for private landlords to make improvements for HMOs although funding and grants would be available for social housing. It would be a national standard that landlords would be expected to*

*comply with before renting out property. Further information on the detail would be made available.*

Cllr Hirst stated that he welcomed the report and the progress made since the last annual update and asked the following questions:

- (1) How soon could the Park and Ride sites be redeveloped into multi modal transport interchanges? *Council officers were currently undertaking feasibility work and speaking to national grid operators. There were issues relating to the connection of solar rays to the grid which may require a battery storage solution. The timescale would probably be a couple of years rather than months due to the complexity of the work.*
- (2) How could residents be persuaded to opt for greener carbon negative heating systems and move away from the use of fossil fuels? *There was practical advice on the B&NES website, but it was a challenge to encourage people to switch due to the cost and disruption of installing alternative heating systems. B&NES was working with the West of England Combined Authority (WECA) to develop the Retrofit Accelerator which would provide an easily accessible support service for homeowners who want to retrofit their property. There were also obstacles within the industry such as a skill shortage of people available to install heat pumps.*

Cllr O'Brien thanked officers for the report and noted the progress made. She asked the following questions:

- (1) What were the details of the 6 sustainable projects identified under the heading of decarbonising transport which had secured £125m funding? *Information on the "City Regional Sustainable Transport Plan" was available on both the B&NES and WECA websites and schemes included the Bristol to Bath A4 corridor, Bath Sustainable Transport, Somer Valley links to Bristol and Bath and Liveable Neighbourhoods. B&NES was mindful of the importance of engaging with communities in developing these projects.*
- (2) The capital cost of redeveloping the Pixash Lane site had doubled. Where was the money coming from? *This was a mixture of borrowing to invest, Government and other grant funding. Capital costs were not met by Council Tax.*

Cllr Bromley made the following comments:

- (1) In relation to the proposed redevelopment of the Park and Ride sites, there needed to be a media campaign to attract local residents. There was a perception that the sites were for visitors to Bath and local residents also needed to be persuaded to use alternatives to the private car when visiting the city centre.
- (2) There had been a lot of recent coverage in the national media about the harm caused by woodburning stoves in terms of pollution which was damaging both to users and the local environment. It was important for local residents to be made aware of this when considering

wood burning stoves as an option for heating their homes. *This comment would be passed onto Cllr Rigby as the Cabinet Member responsible for air quality.*

Cllr Johnson raised the following comment and questions:

- (1) A lot of the achievements in the annual report referred to WECA projects rather than B&NES projects. The report was also lacking clear targets and timescales which were required to measure success. *The WECA projects were joint with B&NES and in addition to the joint projects were specific B&NES achievements such as the Local Plan Partial Update (LPPU) which would help achieve climate emergency targets.*
- (2) B&NES had cut funding to supported bus services in North East Somerset but not in Bath. How could a Bath-centric approach be justified and how could the Council meet transport targets while withdrawing funding to rural services? *B&NES had lobbied WECA for demand responsive transport in the North East Somerset area and as this was not an option in Bath, supported services had been retained.*

Cllr Wills asked the following questions:

- (1) Has B&NES also lobbied WECA about the cutting back of the 178 service which impacted on villages such as High Littleton? *B&NES had lobbied WECA and there would be a new service supporting High Littleton.*
- (2) What was the timescale for the Liveable Neighbourhoods projects which were not part of the 15 prioritised for development? *Work was continuing on the 15 pilot projects and community engagement was a key part of this work. There was no timeline for other projects but progressing the scheme was a high priority.*

Cllr Malloy asked the following questions:

- (1) In terms of increasing renewable energy, would wind turbines be considered where appropriate? *Work had been undertaken to map constraints and identify areas of potential. There were a number of constraints, not only Bath being a world heritage site but also approaches to Bristol Airport and issues relating to visibility. Once the LPPU was approved, the information would be available on the B&NES website and the new policy direction would open up opportunities in the market.*
- (2) In relation to decarbonising buildings and retrofitting older buildings, has B&NES considered working with Bath Preservation Trust to build up its data base? *B&NES did work closely with Bath Preservation Trust but the collection of data was a challenging issue. An EPC was only required when a home was being sold and so homes that had not been on the market for a long time would not have an EPC. Data was a key element of the WECA Retrofit Accelerator project, and the housing team was helping to build up data in relation to different house types.*

The Chair asked the following questions:

- (1) In relation to decarbonising the council fleet, how many vehicles needed to be upgraded, at what cost and did the Council have the capacity to charge electric vehicles? *This was a challenging area, and it wasn't possible to give an accurate answer about costs or number of vehicles. The costs would vary depending on the type of vehicle and it was important for B&NES to consider the most cost-effective way of decarbonising its fleet. The Waste Team was looking at interim hybrid solutions.*

Stuart Gardner, Nature Recovery Manager gave a presentation on the Ecological Emergency Action Plan which covered the following:

- An Ecological Emergency
- Examples of what has been done so far
- Development of the action plan
- The “what”: Vision and Priorities
- The “how”: Action Themes
- Priority Actions
- Focus for 2023

Cllr Hirst commented that as the action plan was at an early stage, it was important to learn from the Climate Emergency Action Plan in terms of tightening up on timelines and deliverables. He asked the following question:

- (1) Although the Biodiversity Net Gain (BNG) requirements in the LPPU would protect areas being developed, was the Council doing enough to protect sensitive sites from being developed? *BNG was not intended to give developers permission to destroy habitats and replace elsewhere but rather to be used as part of a mitigation hierarchy. The aim was to avoid damage in the first instance and only where this was not possible, to use BNG. Nature recovery network work was being carried out to identify ecological corridors with a view to avoiding development of identifying mitigation works in these areas. B&NES was also looking to see if the 10% BNG figure could be increased.*

The Chair commented that when B&NES was looking to identify sites for development, it was important these sites were assessed to be suitable.

Cllr O'Brien asked the following questions:

- (1) Local Members had received a detailed presentation in 2019 from the Avon Bristol Avon Rivers Trust on suggested improvements to the River Chew including works to remove the weir located in Keynsham Park. As work was planned to replace the nearby footbridge, could work on the weir be undertaken at the same time? *B&NES was working with the Trust and water companies to support them in developing their 5-year action plans and getting projects aligned. A new project manager was in post and would be able to*

*give an update pulling all the elements together. The suggestion raised by Cllr O'Brien would be passed on to the appropriate officer.*

- (2) In relation to the 30% target for land protected for nature by 2030, did the measurements relate to volume of land or quality in terms of ecological value? *The 30% target was based on scientific evidence relating to ecological networks. Further work was required to identify where B&NES was in terms of meeting the target. There would be a combination of locally managed sites, sites managed under stewardship and BNG all which would require management schemes.*

Cllr Johnson welcomed the layout of the report and asked the following questions:

- (1) How accessible would the state of nature framework be for local residents/community groups and Parish/Town Councils to use to progress their own commitments? *The Local Nature Strategy was important for these groups to identify key habitats and suggest nature improvements. Parish and Town Councils had been given advice on creating a template for Local Nature Action Plans at the Parish Liaison meeting in November.*
- (2) Was there any more detail on the 4 Sites of Special Scientific Interest (SSSIs) mentioned in the report which were in decline? *3 of the SSSIs were designated for geological interest and the other was a relatively small site designated as calcareous grassland. The SSSIs were monitored by Natural England and monitoring had been sparse since 2010, but more resource was now available to allow B&NES to work with Natural England to assess the sites with a view to bringing them into a good state.*

Cllr Crossley asked the following question:

- (1) Why was there no reference to private gardens in the action plan? *This would be picked up in communications and engagements with local residents which would give advice on how they could bring nature into their lives. This would be a key theme on the website which was due to be launched in the spring. There was also ongoing work with Avon Wildlife Trust and the Natural History Consortium who were developing information packs for community groups in preparation for the Festival of Nature. In addition, the WECA Pollinator Panel was looking at developing small grants which would be available for community groups.*

Cllr Malloy raised the following comment and question:

- (1) As there were no parish councils in Bath, it was important to work with community groups e.g., Wild About Bath and ensure they could access available information and funding.
- (2) In addition to protecting ecological corridors when considering new developments, was anything being done to protect ecological corridors from being eroded when residents turned their gardens into parking spaces? *This would be flagged up to planning colleagues to check policy was robust in this area.*

Cllr Bromley asked the following question:

- (1) Can you give more detail on farming clusters? *These were farmer led schemes which brought farmers together to look at shared issues. B&NES was looking to work closely with these groups to consider issues such as ecological corridors, nature recovery and sustainable farming.*

Cllr Wills asked the following question:

- (1) The report identified 2 out of 18 waterbodies which were in a good condition. What was the status of the other 16 and what were the issues preventing them from being in a good condition? *There were a variety of issues e.g., agriculture pollution, urban pollution, and obstructions, e.g., Keynsham weir. Not many of the waterbodies were in poor status, most were moderate. B&NES would be working closely with other bodies to bring the waterbodies up to good status.*

The Panel **RESOLVED** to recommend that the Climate Annual Report and Ecological Emergency Action Plan be included on the workplan for the appropriate Scrutiny Commission in the new administration.

#### **67 CABINET MEMBER UPDATE**

There was no Cabinet Member update.

#### **68 PANEL WORKPLAN**

The Panel noted the future workplan.

The meeting ended at 6.20 pm

Chair(person) .....

Date Confirmed and Signed .....

**Prepared by Democratic Services**

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<b>Bath &amp; North East Somerset Council</b>		
<b>MEETING/ DECISION MAKER:</b>	<b>Scrutiny Panel</b>	
<b>MEETING/ DECISION DATE:</b>	<b>6<sup>th</sup> March 2023</b>	<small>EXECUTIVE FORWARD PLAN REFERENCE:</small>
		<b>E 3346</b>
<b>TITLE:</b>	<b>Heritage Services Business Plan 2023 - 2028</b>	
<b>WARD:</b>	All	
<b>AN OPEN PUBLIC ITEM</b>		
<b>List of attachments to this report:</b>		
Heritage Services Business Plan 2023 - 2028		

## 1 THE ISSUE

1.1 The report introduces the Heritage Services Business plan for approval. The Plan sets out the strategy to rebuild visitor numbers and financial performance on a sustainable basis, whilst maintaining the high standards of visitor experience conservation and presentation that underpin commercial success.

The outlook for the visitor economy remains unclear; the assumptions upon which the Plan is built have greater degrees of uncertainty in the outer years.

The Plan proposes a budget for 2023/28 that consists of £21M of external income and £12.8M of expenditure. With internal re-charges and income this results in a profit of £8.2m.

## 2 RECOMMENDATION

**The Committee is asked to;**

2.1 Scrutinise the Heritage Services Business Plan

## 3 THE REPORT

3.1 The Business Plan is included as an appendix to this report along with a copy of the Heritage Services Strategy

## statutory CONSIDERATIONS

3.2 N/A

### **4 RESOURCE IMPLICATIONS (FINANCE, PROPERTY, PEOPLE)**

4.1 The Plan 23/28 plan is deliverable within current resource limits. The outer years of the plan will be reviewed year on year to assess any foreseeable resource implication.

### **5 RISK MANAGEMENT**

5.1 A risk assessment related to the issue and recommendations has been undertaken, in compliance with the Council's decision making risk management guidance.

### **6 EQUALITIES**

6.1 Whilst the service conforms to best practice as set by the council and statutory legislation there are specific actions and approaches that could be taken in the context of its conservation, presentation and engagement activities. These in turn will impact on the audiences the service reaches and the staff it employs. These will be crystallised over 23/24 with a clear action plan established to move forward in this area.

### **7 CLIMATE CHANGE**

7.1 The Service is taking a number of measures to address the climate and nature emergency. Existing plans already in place include:

- Energy capture: investigate replacing defunct energy capture equipment at the Roman Baths installed in 1993 with new state-of-the-art kit, to reduce running costs at the Pump Room / Roman Baths complex and supply energy to the new World Heritage Centre and Clore Learning Centre.
- Retail deliveries: the Service will retain its temporary retail warehouse in its non-city-centre location to eliminate multiple merchandise supplier delivery journeys into central Bath.
- Electric van: in tandem with the item above, the Service has leased an electric van to make consolidated retail merchandise deliveries from the warehouse to the Service's museums.

The journey to net zero will begin in earnest in 23/24. The service will undertake to create a strategy looking forward to 2030 that will set out what actions need to be taken to reach net zero within its own carbon boundary. Further to this, the service will also work with stakeholders to initiate a sustainable tourism strategy for BANES.

### **8 OTHER OPTIONS CONSIDERED**

8.1 N/A

## 9 CONSULTATION

9.1 The Business Plan has been reviewed and approved at both the Council's Senior Leadership Team and Informal Cabinet.

<b>Contact person</b>	<i>Robert Campbell +44(0)7815 018899</i>
<b>Background papers</b>	<i>N/A</i>
<b>Please contact the report author if you need to access this report in an alternative format</b>	

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# Heritage Services Business Plan 2023–2028

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## 1. Summary

This is the annual revision of the Heritage Services Business Plan (the Plan). This revision of the Plan sets out the Services' Vision and Mission as it recovers from the impacts of the COVID-19 pandemic, responds to the changing economic situation and its impact on visitor business.

Heritage Services expects to deliver a financial surplus in 2022/23 of £8.2 million.

The Plan sets out the recovery of visitor numbers and financial performance; income is expected to return to pre-pandemic levels next year and to hit 2019/20 profit levels in 2024/25.

The Service will continue to respond to the climate and ecological emergency through a comprehensive baseline study, which will measure its current carbon footprint. The Service will use this to develop a pathway to net zero over the next financial year.

The Service will continue to develop plans for the relocation of the Fashion Museum, within the Milsom Quarter and the creation of a Fashion Collection Archive in Locksbrook. It will complete repairs to the Victoria Art Gallery roof to protect the collection displayed there as well as open a new Community and Education space at the Gallery.

The Service will continue to invest to protect and conserve the Council's heritage assets, improve the visitor experience, enhance commercial performance, and develop its staff to deliver the Plan's outcomes.

## **2. Service Vision and Mission**

During the last year the Service has set a new Vision and Mission. This has been developed through engagement with Service staff and volunteers and ratified through the Council's Senior Leadership team and the Heritage Services Advisory Board, made up of industry experts, senior officers and cabinet members.

A document outlining the Service's new strategy is included as an appendix to this Business Plan.

### **2.1. Vision**

The Service's vision is to: **Learn from the past, understand the present, shape the future**

There are three over-arching aims to achieve between now and 2030:

- Return the Service to pre-COVID profitability;
- Move the Fashion Museum;
- Achieve Net Zero.

### **2.2. Mission**

The Service's Mission is to:

- Create memorable, relevant and emotionally charged experiences for local, national and international audiences;
- Conserve the monuments, buildings and collections in our care;
- Be supporter centric – building long-term, mutually beneficial relationships with people who engage with us;
- Act commercially to generate significant income from our activities and work to contribute to the wider economic prosperity of the region;
- Offer an unparalleled customer experience for everyone;
- Be a leader in sustainable and responsible practice in the Museums, Heritage and Archive sector.

### **2.3. Strategic Priorities**

The Service has six strategic priorities which it will deliver on over the course of the Plan:

1. To provide maximum access to our buildings, monuments and collection to as wide an audience as possible to facilitate learning, understanding and emotional connection;
2. To be a supporter focussed organisation;
3. To maximise income;
4. To operation efficiently and effectively as an organisation;
5. To bring benefit to Bath, the South-West and the UK;
6. To act as an environmentally sustainable and responsible organisation in everything we do.

### 3. Business Strategy

The business strategy is set out below, under the six priorities discussed in section 2.

#### 3.1. Performance Overview

##### Roman Baths

Visitor numbers at the Roman Baths have exceeded budget through Q3 of 2022/23. The budget was for 60% of 2019/20 visitors. At the end of the Summer, performance was on budget. Since mid-August performance has accelerated. Figure 1 below shows footfall relative to budget, pre-pandemic and prior year.

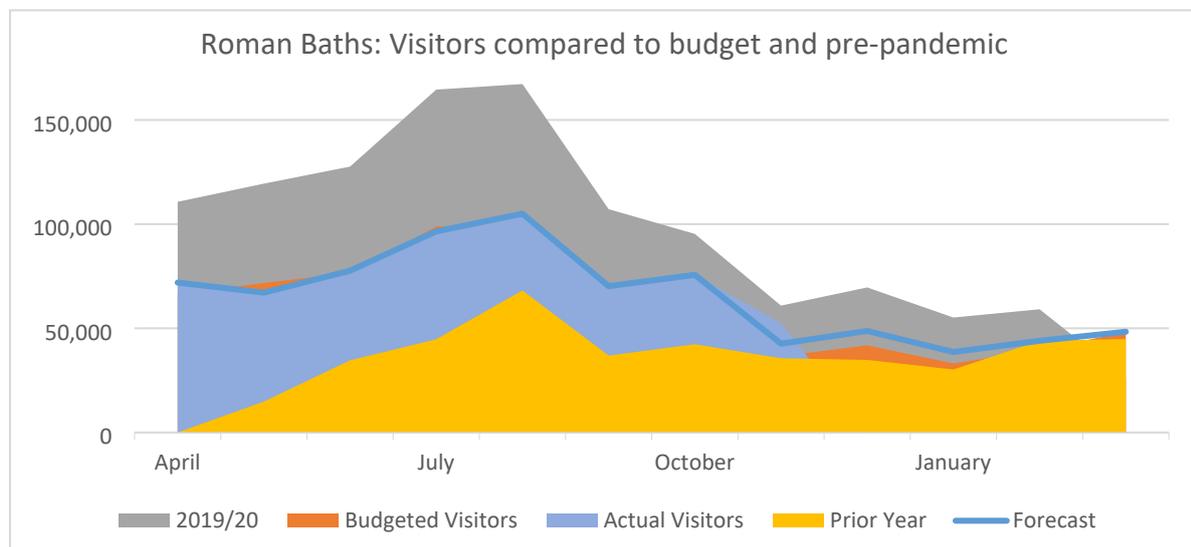


Figure 1: Roman Baths visitor numbers

It's noteworthy that the autumn performance followed the significant changes in the value of the Pound in the autumn, which stimulated an acceleration in the recovery of international tourism.

Secondary spend in retail and in the Pump Room has also been significantly higher than forecast. In part this has been driven by higher than budgeted visitor numbers; however, retail spend per visitor (SPV) has been up has been up over £0.50 visitor through-out this year. Part of the growth in SPV this year has been driven by cost pressures in the supply chain, which have increased cost of sales and therefore the selling price of products. The result in retail is testament to the work of the Retail Team who have had to balance the need to maintain margins, provide value to our visitors and maintain supplier relationships.

The chart below in figure 2 provides a longer-term view of the pandemic’s impact and recovery, shown alongside the visitors to Department of Culture Media and Sport (DCMS) funded museums (chosen as comparators due to their high visitor numbers, national significance and large tourist markets and including: the Science Museum, V&A, Natural History Museum) over the same time period.

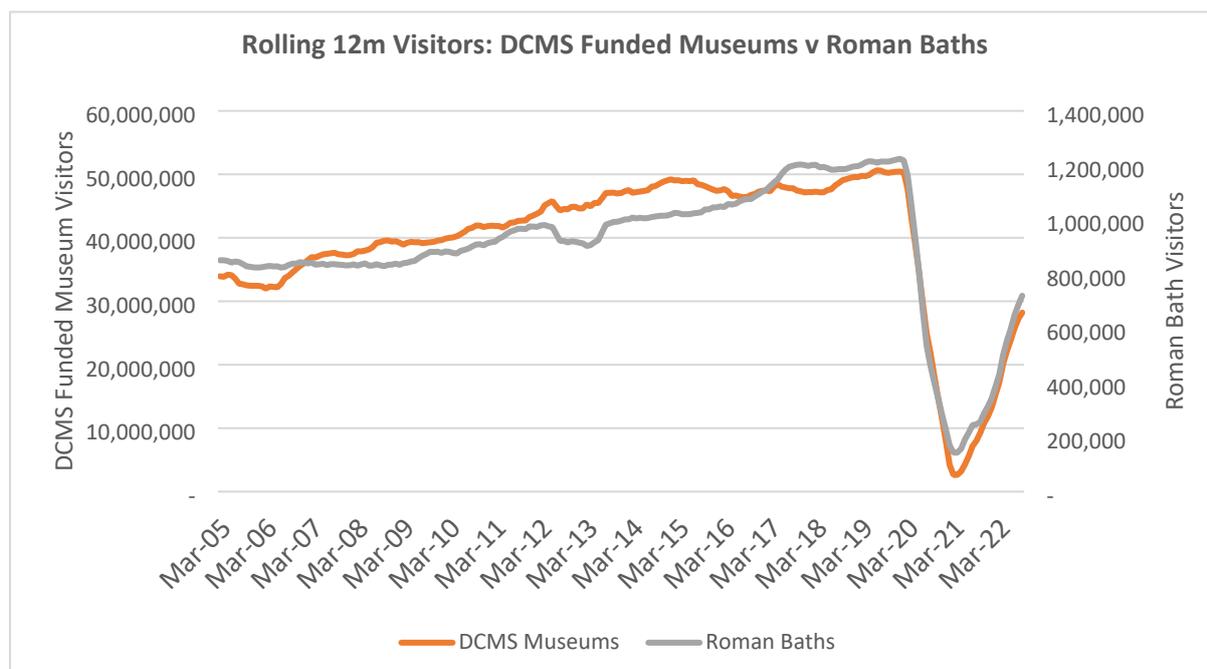


Figure 2: Rolling 12 month DCMS funded museum and Roman Baths visitor numbers

The chart shows that the impact of COVID was even more acutely felt in the (heavily London weighted) based DCMS portfolio; the Roman Baths lost 88% of visitors compared to 95% for the DCMS sites. Our recovery trajectories have been similar although ours slightly steeper since the middle of summer. The Roman Baths had recovered to 59% of pre-COVID total at end Sept, compared to 56% for the DCMS museums.<sup>1</sup> One of the major limiters on the rate of recovery has been the absence of the Chinese market throughout 2022 due to strict COVID restrictions in mainland China that made international travel much more difficult.

<sup>1</sup> More broadly, the chart sets some of the longer-term context for the Roman Baths, in the build up to COVID. The London 2012 Olympic effect, which saw a drop in London museum visitation, was much more acutely felt outside London, as London became the centre for tourist activity that summer. The Brexit referendum (and weakening of GBP) drove a steady increase of visitors to both sets of attractions. The impact of terror attacks in 2017, which saw a switch out of London to “smaller, safer” cities. This chart shows that switch very clearly in May – Aug 2017. Then COVID, which came just after the Roman Baths’ busiest ever year. The fuller impacts of the pandemic have been set out in previous versions of the Plan and are not repeated here.

### Fashion Museum

The Fashion Museum closed to the public on the 30<sup>th</sup> October 2022. The budgeted visitor numbers of 38,000 were just exceeded, with 38,039 people visiting the museum prior to its closure. During the final month in particular, the number of local residents visiting was significantly higher than average.

The plans for relocating the Fashion Museum are discussed in section 3.4 below.

### Victoria Art Gallery

Visitor numbers at the Victoria Art Gallery have been below budget through the majority of this financial year. This is due to fewer than anticipated people visiting exhibitions in the early part of the year.

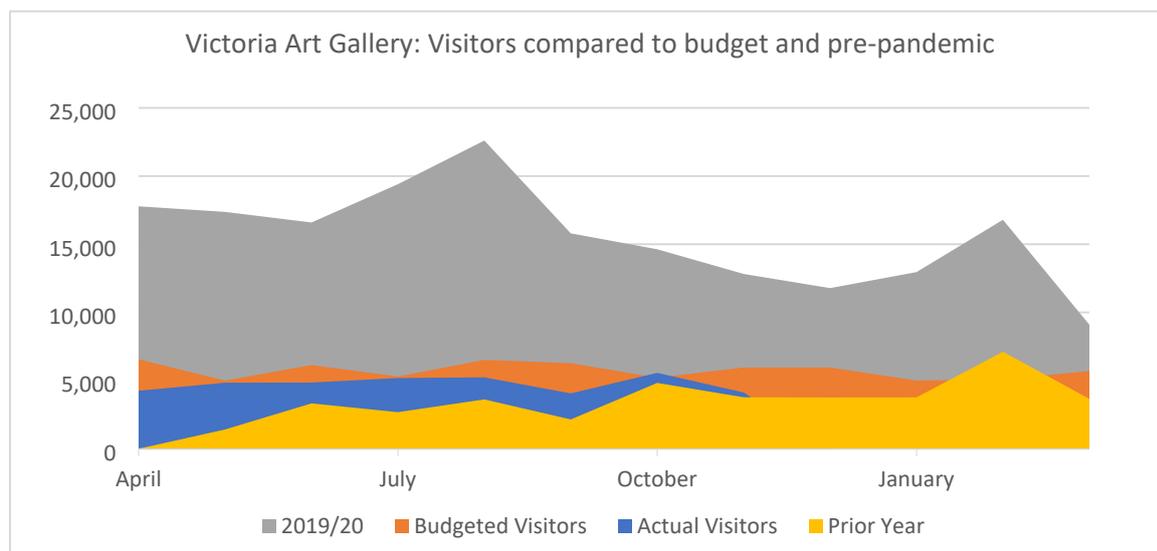


Figure 3: Victoria Art Gallery Visitor Numbers

The Gallery's audience is typically a slightly older audience than the Roman Baths and this section of society have been more cautious about returning to situations where there is an increased level of mixing.

Despite this, retail sales and commission on sales of work have been ahead of expectation. This commercial success has been driven by the Mary Feddon and Peter Brown exhibitions in particular.

### 3.2. Future targets

The financial summary and key future targets are set out in appendix 1 and 2 respectively, alongside the prior year actuals and current year forecast. Figure 4 below shows the expected recovery of both income and profit.

	2021/22 (actual)	2022/23 (forecast)	2023/24	2024/25	2025/26	2026/27	2027/28
External turnover (£000)	14,347	18,123	21,005	24,054	27,449	28,314	28,926
<b>Net Profit (£000)</b>	<b>4,002</b>	<b>5,623</b>	<b>8,233</b>	<b>10,102</b>	<b>12,940</b>	<b>13,327</b>	<b>13,394</b>
<i>Profit as a % of income</i>	27.9%	31.0%	39.2%	42.0%	47.1%	47.1%	46.3%

Figure 4: Heritage Services income and profit

The Plan projects growth in visitor numbers and visitor-driven income from the current performance outlined above. Heritage Services income will return to pre-pandemic levels in 2023/24 however it will be 2025 before visitor numbers return to the levels seen in 2019.

The financial targets for the Service absorb the anticipated pay award to be agreed by the Council for each year of the plan, as well as other inflation pressures on the cost base. Through the lifetime of the Plan, pay is expected to be the biggest cost pressure facing the Service.

Further to this Heritage Services has agreed with B&NES Council that, in principal, the Service will retain over-achievement on budget surplus, year-on-year, to act as a smoothing reserve to support capital funding requirements going forward. This principal will be reviewed each year as part of the Council's annual budgeting process.

### **3.3. Action Against Strategic Priorities**

#### **3.3.1. To provide maximum access to our buildings, monuments and collections to as wide an audience as possible to facilitate learning, understanding and emotional connection**

At the Roman Baths the Service will review and deliver a revised audio-tour, to bring the narrative at the site in-line with the most-up-to-date understanding of Roman Britain. The Service will also create an audience development plan for the Roman Baths and Clore Learning Centre that provides strategic direction to the Service's efforts in engaging with different audiences, including those who we have not traditionally welcomed at our sites.

This engagement plan will ensure that the revised interpretation in the audio-tour reflects the interests of these audience groups. It will also align our engagement endeavours with other Council activities (e.g. with Public Health and the Adult Social Care team).

A programme of temporary exhibitions will continue to be delivered at the Victoria Art Gallery. We will also open a new space in the building dedicated to learning, community engagement and commercial activation.

A new audience development plan for Bath Record Office will be devised so that the archives and local studies can reach wider and more diverse audiences. In turn, this will improve its collecting strategy and ensure its relevance to our communities. We will also look to improve public access to the searchrooms at the Guildhall.

The Re-Fashioning Bath project will be progressed – a fuller explanation of this project is noted in 3.4 below

#### **3.3.2. To be a supporter focussed organisation**

Heritage Services will continue the role-out of the Discovery Card to residents across B&NES, particularly focussing on increasing take-up in areas of the population who haven't previously held Discovery Cards.

The Service will conclude a re-structure creating a new Fundraising, Marketing and Supporter Development team. One of focus of this team will be to undertake feasibility on

the implementation of a new audience segmentation approach and Customer Relationship Management system – both vital to us developing long-term, mutually beneficial relationships with our audiences.

### **3.3.3. To Maximise Income**

Heritage Services will seek to maximise income generating opportunities across its areas of operation.

#### ***Roman Baths***

- Continue to maximise revenue through admission income and retail, whilst maintaining value for money scores at their current level.
- Implement the findings of a consultancy review of the Roman Baths retail offer to deliver additional sales and profit.
- Develop products with partners which encourage overnight stays in the region in order to deliver maximum economic benefits from visitors.
- Launch of the children's guidebook, alongside a review of our family offer.
- Ensuring that experience is at the heart of our product offering, using the site and collection as the backdrop against which people can create amazing memories.

#### ***Victoria Art Gallery***

- Continue to engage loyal repeat visitors and extend this audience through the high quality programme of temporary exhibitions.
- A review of the cross site promotion between the Roman Baths and the Gallery to try and drive more visitors from the Baths to the Gallery.

#### ***Cross Service***

- Continue to integrate the Council's historic venue hire business – improving the customer proposition, the venue marketing and the pricing of products.

### **3.3.4. To operate efficiently and effectively as an organisation**

At the Roman Baths the Service will deliver a new Conservation Management Plan, which will inform our capital and conservation investment in the future. At the Bath Record Office

the team will progress with implementing digital preservation so that collections in digital format are securely stored and accessible.

Across the Service we will continue to progress a strategic approach to Equality, Diversity and Inclusion by delivering an assessment of our overall operation in this context.

We will continue to improve the management and maintenance of our capital infrastructure. Major projects will include remedial work to the roof of the Victoria Art Gallery and investment in the Building Management Systems of both the Roman Baths and Victoria Art Gallery.

An integral part of the strategy going forward will be ongoing investment in the Service workforce. We will continue to build an even stronger performance culture with staff engagement, wellbeing and development at its heart. Some actions we will explore include:

- The ongoing development and delivery of a comprehensive staff engagement and internal communication plan so that all staff are well informed and also able to contribute to the continuous improvement of the service
- Creating an integrated training plan for staff at all levels of the service
- A review of ways to recognise exceptional performance
- Using the new Clear Review system to ensure all staff have an up-to-date forward job plan, linked explicitly to our strategy, that is reviewed on a regular basis. These plans will also focus on developing staff for the benefit of the Service, our customers and their own personal and professional goals. We will also systematically embed our expectations and actions related to health and Safety, the climate crisis and diversity, equality and inclusion into these plans
- Developing a wellbeing strategy specific to Heritage Services – taking the best of the work undertaken by the council and tailoring it to our specific circumstances
- Encouraging further initiatives which encourage cross site working to break down silos and develop a single service culture

In order to deliver on the Strategic Priorities outlined in this document the Service will also need to increase its staffing complement. The current structure and staffing levels reflect the Service's ability to deliver on its pre-Covid priorities, namely surplus generation at the Roman Baths. With the new strategy promoting a wider emphasis for the Service additional staff will be required. The prospective increases in cost base will be confirmed and enacted

over 23/24 but their potential impact has been taken into account when considering the surplus income figures noted in this Plan.

### **3.3.5 To bring benefit to Bath, the South West and the UK**

Heritage Services will use its platform and influence to:

- Represent B&NES on the West of England Combined Authority (WECA) Cultural Compact to deliver on the WECA cultural strategy;
- Represent B&NES as a board member of Visit West and work with Visit West to deliver the destination development plan for the region;
- Represent The Roman Baths and Pump Room as a board member for the Association of Leading Visitor Attractions;
- Work with Bath's Cultural and Creative Ambition Board to establish how the Council can contribute further to the cultural offer across the district;
- Work with other teams within the Council's Sustainable Communities Directorate to contribute to the Economic Strategy and Local Plan to ensure they recognise and include a vision for a sustainable visitor economy within B&NES over the lifespan of those plans.

23/24 will see the World Heritage Management (WHM) function move from Heritage Services to the Planning Service. The WHM team have worked well within Heritage Services and this has coincided with a period when the focus of the Council's efforts in this space have related more to the interpretation and engagement aspects of Bath's inscription – specifically in delivering the new World Heritage Centre and securing the second World Heritage Site Inscription as part of the Great Spas of Europe. Looking forward, the WHM function will be more concerned with the impacts of development, sustainable tourism and green transformation on the Outstanding Universal Values for which Bath is inscribed. This means it will be better situated within the Planning Service – making it more integrated into a wider range of the Council's activities and providing excellent advice and education to colleagues directly grappling with these upcoming issues. As part of this move the Council

will be investing in a dedicated resource to manage the ongoing activity related to the Great Spas of Europe Inscription whilst retaining a full-time position to deliver on issues more specifically related to Bath. These changes demonstrate the Council's commitment to Bath's dual World Heritage Inscription and will help to ensure that the benefits of both are maximised going forward. The Head of Heritage Services will retain his place on the World Heritage Advisory Board and will work closely with the Planning Service on all aspects of WHM related to interpretation and engagement – the strengths of Heritage Services.

### **3.3.6 To act as an environmentally sustainable and responsible organisation in everything we do**

The Service has made progress in some areas in the last 24 months, most significantly in the form of an energy capture scheme, taking the heat from the Kings Spring and converting this to energy to provide heat to the Clore Learning Centre, World Heritage Centre and overall Pump Room building complex.

The relocation of the retail stock warehouse to the outskirts of Bath has removed supplier deliveries from the city centre and the Retail team are awaiting the delivery on an electric van to move stock between the warehouse and the Heritage Services shops, further reducing the impact of the operation.

However, the Service has not yet developed an overall strategy to achieve net zero, in line with the climate emergency declaration made by the Council. Work will be undertaken in order to develop this strategy over the next 12 months. This work will be delivered in four stages and the Service will complete stage 1 and 2 in the 2023/24 financial year.

- Establish baseline of emissions. Heritage Services has commissioned a study to establish a baseline, from which to set and measure carbon reduction targets.
- Develop a pathway to net zero. From the baseline study we will create a pathway to net zero, identifying the priority areas to reduce.
- Create a comprehensive climate action plan. Informed by the pathway to net zero we will develop an action plan to reduce emissions as quickly and efficiently as possible. This will include strategies including asset replacement, procurement and supply chain management, reduced usage and influencing staff and visitor behaviour.

- Measure and report against the climate action plan. This will form a standing agenda item for the Heritage Advisory Board and future iterations of this plan will also report on progress against this objective.

### **3.4. Re-Fashioning Bath (relocating the Fashion Museum and Collection)**

#### **3.4.1. Project overview**

The Fashion Museum is one of the world's great museum collections of historical and contemporary fashionable dress and Designated by government as a collection of outstanding significance. The collection contains over 100,000 artefacts and has been exhibited in the Assembly Rooms in Bath, which the Council has leased from the National Trust, since the 1960s. Pre-COVID it attracted 100,000 visitors a year to the city of Bath.

The National Trust have decided to take possession of the building to create a new heritage experience celebrating the Georgian era in Bath and the Fashion Museum closed to the public in October 2022.

Creating one of the most significant cultural infrastructure projects in the country, the Council aims to establish a new Fashion Museum in Bath City Centre and a purpose-built home for the collection in Locksbrook. Both places should play a pivotal role in the economic, cultural and social future of the city, preserving access to one of the world's great museum collections as well as delivering regeneration, economic, skills, placemaking and wellbeing benefits across the region.

#### ***The Museum***

The Council has acquired the Old Post Office building within the Milsom Quarter of the city. This will be the new home of the Fashion Museum with permanent displays, temporary exhibitions, dedicated learning and community spaces and secondary spend opportunities such as retail, food and beverage and venue hire options.

Initial modelling suggests that the museum should attract 250,000 visitors per year. It will allow audiences not only to consider the beauty and craftsmanship of historic and

contemporary fashion, but to use the collection as a lens to understand themselves and the world around them better. Visitors will be encouraged to engage in issues such as sustainability, identity and social justice.

### ***The Fashion Collection Archive***

The intention is for the collection which is not on display to be stored in a purpose-built facility, co-located with Bath Spa University, at a site in Locksbrook. The facility will be built to minimise carbon footprint and should be an exemplar of contemporary museum storage.

The Service will look to renew its memorandum of understanding with Bath Spa University. The Fashion Collection Archive will meet the needs of a diverse range of people, including designers, makers, researchers and film studios, to access and experience the collection for their own purposes.

### ***Tackling Deprivation***

The aim is for both facilities to be hubs for inclusive cultural engagement – with programming and activities targeted at those in some of the most deprived communities in B&NES. The Service envisages that the operations of both sites be underpinned by a strong cohort of volunteers, placement and internship opportunities. This may include the use of the collection in skills based courses to target long-term unemployment and the creation of a ‘hub and spoke’ model to extend programming into deprived communities via pop-ups in vacant units and using existing local infrastructure. We will work in partnership with Council departments and third-party providers to reach those communities who would benefit most from engagement with this project. All Discovery Card holders in B&NES will have free access to both facilities.

### **3.4.2. Interim storage and engagement**

Whilst a new permanent home is created the collection is housed at Dents glovemakers, one of the UK’s leading heritage fashion brands. The costs associated with this storage are built into the Plan.

The collection will be as open as possible, with a range of engagement activities during the time it is in temporary accommodation. Heritage Services will run digital engagement and

community consultation workshops for the new Fashion Museum project. This Service will continue to loan objects from the Fashion Museum collection to exhibitions world-wide as well as exploring the opportunity for temporary exhibition opportunities across Bath and the South West.

### **3.4.3. Project costing and overview**

The project costs are estimated at £34m. The funding plan for the project is as follows:

- Funding has already been secured for the acquisition costs of the Old Post Office site and feasibility and design work on both the Locksbrook and Old Post Office sites. This funding will progress the schemes to RIBA stage 3 and planning application.
- A fundraising campaign will contribute to the remaining project costs alongside other funding routes currently under review.
- The aim is for the new museum to open in 27/28, this is dependant on a successful fundraising campaign to enable contracts to be awarded.
- An independent charity will be launched in 2023 to support the project.

## 4. Risk

There has perhaps never been a greater level of uncertainty when revising the Plan. The recovery following the COVID 19 pandemic is still not fully established, whilst inflationary economic pressures restrict the level of disposable income that potential visitors have to spend on leisure activities.

The Plan assumes that there will be no new impacts as a result of the Coronavirus pandemic and projects steady growth back to pre-pandemic visitor numbers in 2025.

The Plan assumes that the trajectory of recovery will not be significantly impacted by the global economic pressure referenced above. The Roman Baths has performed well during previous recessions benefiting from a staycation effect (as domestic audiences chose not to go abroad or not to holiday within the UK, but still undertake day trips). It is also important to note that international tourists benefit from the current low value of the Pound and also tend to represent the more affluent sections of society and are therefore better able to absorb the impact of inflation than other demographics of society.

The Plan assumes that there will be no new adverse impact caused by security, economic or environmental events, but it should be noted that terrorism continues to pose a risk. The proposed city centre counter-terrorism measures are designed to reduce the risk of such an event. Potential further international uncertainty driven by geopolitical incidents also casts a shadow over the future years.

Within the Council's General Reserves via the Robustness of Estimates calculation, a risk of £2.5m was recognised in 2022/23. This was assessed as medium risk; the Plan recommends that this risk provision is maintained.

There are inherent risks to the Fashion Museum relocation project. These principally relate to the funding of the project and the impact that securing funding may have of the timeline of the project. However, the risk noted in the Plan last year, in relation to the temporary storage of the collection has been resolved with the agreement to house the collection with Dents.

The pathway to net zero, discussed above, is currently uncosted and unfunded. The work to establish the interventions required, due to take place in the next twelve months, will inform the budget requirements for this work.

Throughout 2022 the Service has experienced significant staff shortages, particularly in Facilities and Retail staff. Recruitment challenges were exacerbated by the protracted pay negotiations which delayed the 2023 pay award. The staff shortages, coupled with high visitor numbers through the summer placed pressure on staff and increased focus has been paid to mental health wellbeing over 2022 with a focus on staff recognition, improved communication and workload management.

The widened remit of the Service, and the challenges and opportunities presented by the post COVID world, require a review of the staffing structure and complement in the Service. Any increase in cost base will need to be well judged so that it can solidify, and/or grow, the overall surplus to be returned.

# Appendix 1: Financial Summary

## Heritage Services Business Plan 2023-28

[Contents](#)

### Business Plan Summary

	Prior Year Actuals		Current Year	2023/24 Financial Year	Plan Years			
	2020/21 £'000	2021/22 £'000	Budget £'000	Budget £'000	2024/25 £'000	2025/26 £'000	2026/27 £'000	2027/28 £'000
Admissions	(2,503)	(8,495)	(14,573)	(17,528)	(21,004)	(24,144)	(24,875)	(25,379)
Retail Sales	(238)	(1,155)	(1,657)	(2,283)	(2,009)	(2,261)	(2,362)	(2,447)
Room Hire	(44)	(369)	(742)	(714)	(492)	(502)	(512)	(522)
Catering	(45)	(264)	(373)	(334)	(344)	(354)	(365)	(376)
Other Income	(11)	(378)	(204)	(308)	(181)	(164)	(177)	(178)
Grants/Contributions	(12,668)	(3,687)	(97)	(22)	(25)	(25)	(25)	(25)
<b>Total Income</b>	<b>(15,509)</b>	<b>(14,347)</b>	<b>(17,646)</b>	<b>(21,189)</b>	<b>(24,054)</b>	<b>(27,449)</b>	<b>(28,314)</b>	<b>(28,926)</b>
Employee Costs	4,524	5,003	5,311	5,629	6,176	6,419	6,675	6,938
Premises Costs	1,240	1,277	1,390	1,628	1,789	1,889	1,997	2,111
Transport Costs	40	44	50	30	31	32	33	34
Supplies & Services	1,116	1,936	2,505	3,080	3,080	3,279	3,401	3,517
Other Costs	1	1	1	1	1	1	1	1
Maintenance	326	386	597	509	539	550	562	574
Investment	396	249	474	495	766	770	750	790
<b>Total Expenditure</b>	<b>7,643</b>	<b>8,895</b>	<b>10,329</b>	<b>11,371</b>	<b>12,383</b>	<b>12,940</b>	<b>13,418</b>	<b>13,964</b>
Internal Income	(2,539)	(2,719)	(3,307)	(3,981)	(4,118)	(4,237)	(4,364)	(4,496)
Recharge codes	4,264	4,170	4,899	5,566	5,709	5,828	5,955	6,087
<b>Internal Recharges</b>	<b>1,725</b>	<b>1,451</b>	<b>1,593</b>	<b>1,585</b>	<b>1,591</b>	<b>1,591</b>	<b>1,591</b>	<b>1,591</b>
<b>(Surplus) / Deficit</b>	<b>(6,141)</b>	<b>(4,002)</b>	<b>(5,725)</b>	<b>(8,233)</b>	<b>(10,081)</b>	<b>(12,918)</b>	<b>(13,305)</b>	<b>(13,371)</b>
Operating Margin	39.6%	27.9%	32.4%	38.9%	41.9%	47.1%	47.0%	46.2%
Operating Margin (pre investme	42.2%	29.6%	35.1%	41.2%	45.1%	49.9%	49.6%	49.0%
Wage %	29.2%	34.9%	30.1%	26.6%	25.7%	23.4%	23.6%	24.0%

## Appendix 2: KPI Targets

	2021/22 (actual)	2022/23 (forecast)	2023/24	2024/25	2025/26	2026/27	2027/28
Roman Baths visitors (000s)	431	785	888	1,044	1,200	1,236	1,266
Victoria Art Gallery visitors (000s)	40	66	66	71	71	71	71
World Heritage Centre visitors (000s)	0	70	88	104	120	124	127
Roman Baths income per visitor (£)*	21.68	22.08	22.48	22.19	22.13	22.15	22.09
Education visitors at Roman Baths (000s)	4,733	6,745	19,499	20,880	24,000	24,720	25,320
Community Participants	988	19,283**	18,700	19,000	19,300	19,500	19,700
Discovery Cards Issued (000s)	0	23,000	5000	5,500	6000	6,500	30,000***
Social media followers	129,923	194,077	212,191	237,443	262,939	291,678	324,259
Discover Card holder visits (000s)	11,984	11,760	14,208	16,704	19,200	19,776	20,256
Net profit per Council Tax household (£)	47.18	66.31	95.13	119.11	152.58	157.15	157.94
* admission income plus retail sales & other sales and restaurant commission ** includes activities run at the Fashion Museum, which has closed *** Discovery Cards have a 5 year renewal lifecycle meaning those issues in 22/23 will begin to expire in 27/28							



# Heritage Services

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Strategy  
2022-2027



Bath & North East  
Somerset Council

Improving People's Lives

## Who we are

**Heritage Services is an essential part of Bath & North East Somerset Council; responsible for stewarding the public facing heritage assets in the council's care.**

The council established Heritage Services as an independent business unit in 2005 allowing the service greater financial freedom and agility delivering, in return, an agreed surplus for the council. Heritage Services is unique amongst UK local authorities in operating at no cost to the local taxpayer; the service is singular, within the council, in self-funding all cost increases. Instead, the service provides reductions in council tax to residents and helps fund the council's delivery of cardinal services, such as social care, schools, and housing.



A study appointment with the fashion collection



The Archway Project



Bath World Heritage Centre



Launch of the Roman Gym, 2021

# Vision

This statement informs all of our work. It is the guiding principal by which we seek to bring benefit to the world:

Learn from the past,  
understand the present,  
shape the future

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A Roman curse tablet



Family in the Victoria Art Gallery

We have three overarching priorities that this Strategy will deliver on:

**1.**  
Return the service to its pre-Covid profitability

**2.**  
Move the Fashion Museum

**3.**  
Achieve Net Zero by 2030



Roman Baths Togas and Tunics

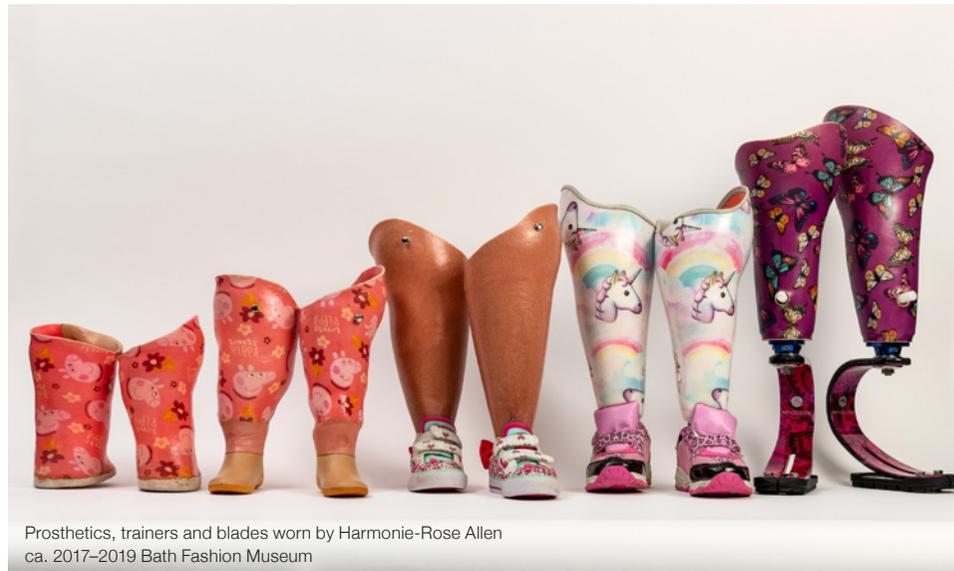
# Mission

- ▶ Create memorable, relevant and emotionally charged experiences for local, national and international audiences
- ▶ Conserve the monuments, buildings and collections in our care
- ▶ Be supporter centric – building long-term, mutually beneficial relationships with people who engage with us
- ▶ Act commercially to generate significant income from our activities and work to contribute to the wider economic prosperity of the region

- ▶ Offer an unparalleled customer experience for everyone
- ▶ Be a leader in sustainable and responsible practice in the Museums, Heritage and Archive sector



A study appointment with the fashion collection



Prosthetics, trainers and blades worn by Harmonie-Rose Allen  
ca. 2017–2019 Bath Fashion Museum



Dress of the  
Year 2021

# Mission: Corporate link

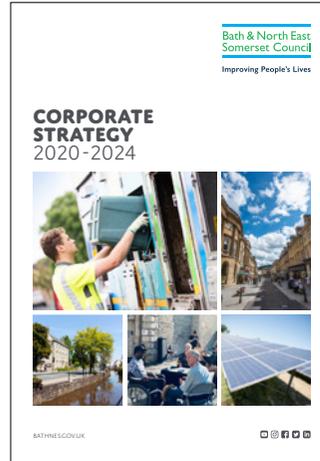
We **improve people's lives** directly through the experiences and opportunities we offer and indirectly via the surplus we return for use by the council



We will **tackle the climate emergency** within our own carbon boundary and strategically through our influence within the sector



We will **give people a bigger voice** by making community participation, audience evaluation and co-creation central to how we approach what we do



The Great Bath



Building a Healthier City Project



Visiting the Victoria Art Gallery

# Culture

This is how we do things in Heritage Services. It is everyone's responsibility to live these values when they work for us:

## Bold



- ▶ We'll do whatever it takes to make sure people love their interactions with our sites and collections
- ▶ We set aspirational goals, try new things, embrace change and learn from our mistakes
- ▶ We look outwards to help us continuously improve what we do
- ▶ We use data and research to help us set the right outcomes, make the right decisions and understand how things have gone

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## Empowered



- ▶ When someone performs well we recognise this and celebrate it
- ▶ Everyone knows what is expected of them and what good looks like so they can take the initiative and get things done
- ▶ Everyone understands our audiences and how to give them what they need
- ▶ Everyone is focussed on their personal development and, if they have them, of their staff too

## Supportive



- ▶ We care about each other and want to make sure we are enjoying ourselves at work
- ▶ We can make sure everyone has what they need to get the job done – including the right equipment and enough time
- ▶ We work collaboratively across the service, council and with external stakeholders

## Transparent



- ▶ We all know what the plan is, why we are doing it and make an effort so everyone knows what is happening
- ▶ We listen to our supporters and work with them to improve how we do things
- ▶ We listen to our colleagues and actively encourage constructive criticism from any person in the service to contribute to our continuous improvement
- ▶ We learn lessons, make sure we embed best practice and don't repeat our mistakes

# Strategic Priorities

1.

To provide maximum access to our buildings, monuments and collections to as wide an audience as possible to facilitate learning, understanding and emotional connection

2.

To be a supporter focussed organisation

3.

Maximise income

4.

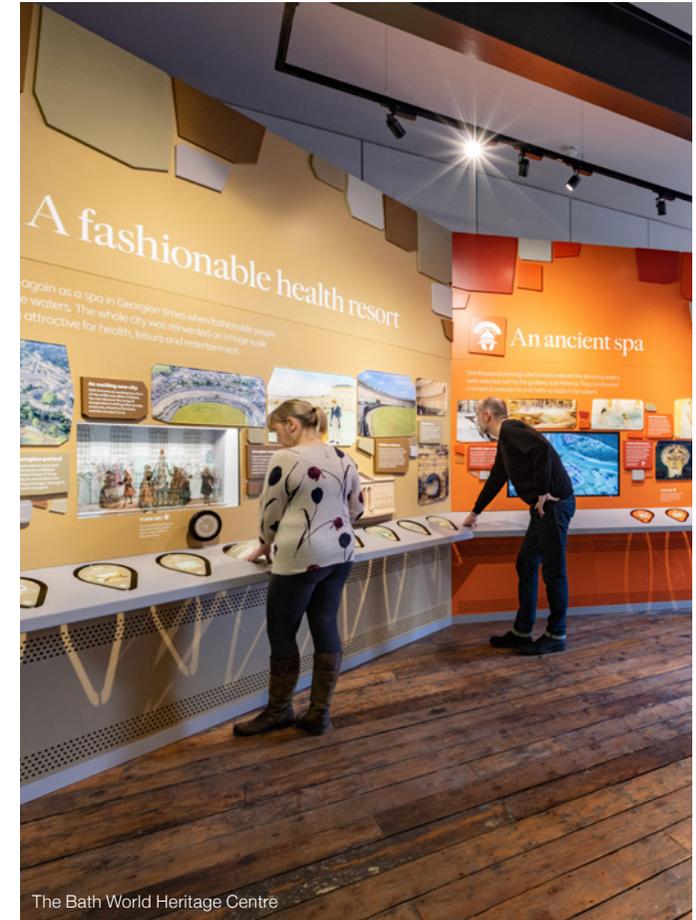
To operate efficiently and effectively as an organisation

5.

To bring benefit to Bath, the South West and the UK

6.

To act as an environmentally sustainable and responsible organisation in everything we do



The Bath World Heritage Centre

Cover (clockwise from top left): The Roman Baths by torchlight, The Fashion Museum Collection, Bath Record Office and The Victoria Art Gallery.

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