



BATH  
PRESERVATION  
TRUST

Vision for 2030







Our Vision for 2030 sets out a strategy for the charity we will become – a statement of our intent and aspiration and how we will achieve the vision. It defines the sustainable social, environmental and economic impacts we will make and by which we will measure our success.

Bath Preservation Trust (BPT) has been on a journey of rapid change in recent years and has emerged from the global pandemic as a stronger, more resilient and more necessary organisation.

Coronavirus has made people realise the importance of togetherness, of community and of shared common values and interests. Social, cultural and built heritage is important; learning and wellbeing is important; landscape, nature and locality is important. BPT exists to provide advocacy for all these things, to ensure Bath can grow sustainably and appropriately, recognising and respecting the value of its heritage and green setting whilst being an evolving, vibrant and contemporary World Heritage city.

Climate change and the climate emergency continue to be a global threat requiring urgent action. Our Vision to 2030 is one of optimism and ambition, through which we lead by example, implementing sustainable design and construction as well as advocating positive adaptation of historic buildings, and the public realm in Bath and beyond. BPT will exemplify the sustainable change we want to effect as a positive partner and active catalyst for action.

Equality / equity, diversity and inclusion (EDI) is central to our ethos, our workforce and volunteers and our public programming. We will continue our process to decolonise our collections and museums to ensure we provide safe spaces in which to question, to challenge, and to engage with the past, the present and the future.

**Thomas Sheppard, Chair**

**Alex Sherman, Chief Executive**

## Our Mission

Bath Preservation Trust campaigns for and promotes the conservation, sustainable enhancement and celebration of the unique historic built environment and amenity, green setting and global contributions of the City of Bath as a World Heritage Site. At our heart are the principles of informed advocacy, learning for all, and the provision of authentic heritage experiences at our four museums, through partnership working and online.

## Our Vision

We believe Bath deserves excellence in design and contemporary sustainable development which is inclusive of all people, and improves social and economic opportunities without compromising our unparalleled built heritage and natural environment.

Our museums and collections provide inspiring experiences, learning and insights from the past which help people deepen their knowledge through narratives expressed appropriately, knowledgeably and equitably.

We:

- Promote our commitment to sustainable development for Bath and demonstrate the value of heritage in a changing world
- Advocate and campaign for the total public realm, a healthy environment and a thriving living city
- Champion forward-thinking and appropriate sustainable architecture and design worthy of the World Heritage City of Bath
- Continue the successful innovative development of, and increased access to, our museums through careful growth and targeted promotion
- Encourage and enable Bath citizens to take an active responsibility for the future welfare of the city via membership, volunteering and support
- Provide opportunities for learning for people of all ages in all areas of our work, supporting personal wellbeing and social inclusion

## Our Values

The culture and activity of Bath Preservation Trust is led by the common values we share and these demonstrate what all people can expect when they engage with our advocacy and campaigning, visit our museums, events or learning activities, or work with us.

### Authentic

We convey information accurately, honestly and with care, engaging with and representing the voices and involvement of others alongside our own areas of expertise, as a reliable and trusted heritage charity.

### Engaged

We are an active leader, collaborator and contributor in the community of Bath and its rural environs, and connected to communities of interest and heritage networks across the UK and internationally.

### Inclusive

We seek to engage with as wide an audience as possible, providing accessible, safe-space museums and experiences. We are advocates for growth and development in Bath which is affordable, accessible and which supports the local economy, environment and population.

### Informed

We are committed to lifelong learning for all as a valuable tool to increase understanding and knowledge and to support the health and wellbeing of people. We also learn from others to gain insights and shared knowledge about the past, the present and the future, and the way we deliver our services.

### Responsible

We are responsible custodians and communicators of the charitable aims of BPT, the stories contained within our museums and collections, and of our role in Bath. We advocate for positive and sustainable development of the city and its environs and to limit the impacts of climate change.

## Sites and cultural and commercial services

### Advocacy and Campaigning

BPT was established as a campaigning organisation to protect the character and intrinsic value of Bath against unsustainable development and issues relating to traffic. More recently it has added advocacy for sustainable development and de-carbonisation. Working with expert volunteers, BPT comments on more than 200 planning applications each year and engages with B&NES Council and developers aiming to influence positive change. Informed advice is provided to homeowners about planning applications for historic houses and listed buildings.

### Membership

BPT has a significant number of members, with most subscribers joining out of a shared love and concern for the conservation of the historic fabric and character of the city of Bath. Members come from all walks of life and provide support and demonstrate commitment to our charitable aims.

### Learning

The provision of learning for all people is at the centre of BPT's work and we provide formal and informal learning, including curriculum learning sessions for school children, engagement with university under and post-graduate students and family learning experiences. Learning spaces and resources are provided at all museums and BPT has a growing loans scheme.

### Public Programme

A coordinated public programme of activities and temporary exhibitions is delivered throughout the year across all sites, providing new stories and understanding about Bath's heritage and its social history.

### World Heritage Site

With its commitment to sustain and perpetuate the World Heritage Site Status for Bath, BPT is an active, leading adviser and partner. It provides match funding and staff support for the delivery of the Enhancement Fund, enabling projects which enhance the public realm, restoring historic features and amenity for the enjoyment of all.

### No. 1 Royal Crescent

A Grade I listed Georgian property, built to the designs of John Wood the Younger in 1767 - 1774 as the first house in the Royal Crescent. Operated as an historic house museum, No.1 underwent a major refurbishment in 2012-13. In 2021 a ground-breaking, exemplary new immersive experience was created, providing a guided tour exploring the social history of Georgian Bath.

### Herschel Museum of Astronomy

The former home of siblings William, Caroline and Alexander Herschel, this Georgian era mid-terraced townhouse is where the planet Uranus was discovered on 13 March 1781. William was a renowned composer and avid amateur astronomer, building his own telescopes. Caroline was one of the first salaried female scientist in England, discovering many new comets. The museum tells the story of the Herschels and their importance to the world of astronomy, science and music.

### Countess of Huntingdon's Chapel

Also known as the Museum of Bath Architecture, the collection explores the rich architectural history of Bath as it was transformed from a small medieval town to the world famous Georgian city. The building is home to the archive of Bath Preservation Trust and the extensive Bath Buildings Record. The Chapel requires major capital investment and will become a centre for heritage learning, and a museum which interprets the architecture and design of Bath.

### Beckford's Tower and Landscape

Built between 1826 and 1827, Beckford's Tower is a building of high significance that was once home to one of the most important collections of books, furniture and art in Georgian England. It now stands as the only surviving example of the writer, collector and slave owner William Beckford's architectural achievements. Located in a prominent landscape setting to the north of Bath, the Tower has unrivalled views across the city and the setting of the World Heritage Site. On the Historic England 'At Risk' register, the *Our Tower* project seeks to restore the building and reinterpret Beckford's life and legacy.





## Objectives and Delivery

### Objective 1

**To be recognised as the key guardian of Bath's rich cultural heritage and campaigner for the sustainable economic, social and environmental improvement of the City.**

We will:

Use our established presence and recognition in Bath as a **positive, informed, trusted and engaged partner**, seeking opportunities to build and lead new partnerships and to provide constituent and holistic processes which enhance and conserve the Outstanding Universal Value of Bath World Heritage Site.

Create a **strategy for our Advocacy and Campaigning work**, combining forward thinking and research, design-led vision statements and community engagement. This approach will guide our reactive responses to local and national policy changes and planning applications and proactively promote and share best practice. The recognition of this work will be enhanced through a new online presence and more prominent public communications.

Engage with audiences, decision makers and partners through a public programme of activities and events, as an **expert leader** in heritage, architecture, city planning and the public realm. We will also seek to continually broaden this engagement through new activities including conferences, forums and digital methods.

Showcase the impressive breadth and importance of the outcomes realised through the **World Heritage Site Enhancement Fund** (WHSEF), demonstrating how well-planned, modest investments enhance the public realm and engender a sense of place for residents and visitors alike.

Work with Bathscape and natural heritage partners to demonstrate and enhance the **value of our green spaces and rural surrounds** as an essential and integral part of the city, including the intrinsic benefits of the green belt. We will use our sites creatively, especially at Beckford's Tower, which is a key green public area and intersection for footpaths on the north side of Bath.

**Use our museum collections creatively**, seeking partnerships and touring opportunities. Through these, we will engage people with the story of the building of Bath and the importance of historic buildings for heritage, understanding of social history and also as a valuable repository of embodied carbon.

Create sustainable opportunities to **broaden our offering to, and engagement with the public**, providing new insights and interpretation of the rich cultural heritage of Bath for its residents and visitors.

Provide **learning opportunities** to people of all ages, to promote our work, our role within Bath and to engage people with many stories from the past. We will do this in our museums, through our advocacy work, in our archives and using the knowledge base of our staff and volunteers.

**Lead by example** as a sustainable, forward thinking, change-making heritage charity. We will promote and report our social, environmental and financial impacts, identifying us as a leading sectoral charity, which embodies positive adaptation.

## Objectives and Delivery

### Objective 2

**To become an exemplar in demonstrating Bath's contribution to architecture, science and creativity through engagement and learning.**

We will:

Perpetuate understanding of and access to the diverse opportunities and stories presented at our Museums, seeking investment and positive development to implement new methods of interpretation, increase on site and virtual public access and engage with more people than ever before.

- **No.1 Royal Crescent** will always be BPT's flagship and we will continue to invest in and improve the property, its storyline and the visitor experience. More spaces will be made available for public access and we will work with partners to link stories which help people understand the social fabric of Georgian Bath. We will showcase best practice and provide innovative, high-quality and sector leading experiences.
- **Herschel Museum of Astronomy** is an inspiring, unique space resonating with a global audience of scientists, star-gazers, comet hunters, musicians and historians. We will seek to extend its offer on site, engage with international activities and partners and make it a must-see destination for all.
- **Beckford's Tower** will be open to the public following the completion of a major capital restoration project which will ensure future structural integrity and its removal from the 'At Risk' register. The restored Tower, sitting in its unique green locations, will see a new high quality and accessible visitor experience which re-tells the complex story of William Beckford authentically and from a de-colonised perspective.
- The **Countess of Huntingdon's Chapel**, recently known as the Museum of Bath Architecture, will be re-imagined as the new hub and headquarters of BPT. It will continue to display and showcase the collection and provide public access to the archive both on site and online. The Chapel will become a centre for learning and research for people of all ages, a multi-use civic space and the public manifestation of our Advocacy and Campaigning work, with a particular focus on retrofit and sustainability.

Engage with existing, and seek out new **multi-disciplinary partnerships** with stakeholders, communities, academics and creative industries to add value to the understanding of the Outstanding Universal Value of the World Heritage City of Bath and its multi-layered cultural influence.

Create a diverse and engaging **public programme**, coordinated across all sites and including digital, pop-up and outdoor events. Our rolling programme of activities will include temporary exhibitions, lifelong learning experiences and family events.

Invest in the enhancement and **development of our collections**, particularly the Bath Buildings Record. We will explore our collections and sites through new acquisitions, contemporary collecting and commissioned work.

Make our **learning programme** as accessible to as many people as possible, through schools, universities and providing activities for lifelong learners. We will do this through our sites, collections and loans service and build new digital and self-guided options.

## Objectives and Delivery

### Objective 3

**To work in the interests of Bath's citizens by holding local government and developers to the highest standards of informed decision-making and sustainable, de-carbonised design.**

We will:

Use the re-imagined public spaces at the Countess of Huntingdon's Chapel as a new community learning and research centre for residents, students and visitors to Bath, focusing on sustainability, appropriate development, excellence in urban design and learning. Demonstrating examples of sustainable retrofit, it will be a **hub for the advocacy and campaigning activities of BPT** and home to our Archive, Library and Bath Buildings Collection. The Chapel will also provide a unique events space in the heart of the World Heritage city of Bath for lifelong learning, and temporary exhibitions.

**Engage with local and national policy** and development issues relating to historic buildings, development, housing issues, retrofit and green technology, economic development and spatial planning and transport. We will support and recognise good practice where it is implemented, present clear position statements in collaboration with others and hold local authorities to account where their policies fall short of requirements and local expectations.

Increase our engagement and role with **academic learning partnerships** to enable the next generation of landscape, public realm and built environment architects, designers and planners to be more engaged and consultative through direct experience.

Work with partners to develop **interactive digital tools** for accurate carbon modelling and publicly report the carbon cost of new developments vs retrofit and modification of existing modern and historic buildings, recognising the value of the 'triple bottom line'.

Develop tangible ways for people to understand the **benefits and processes of retrofit** for historic properties, including the creation of a full library of case studies which provide tangible examples of appropriate costed solutions targeted at all pockets and proportionate savings and environmental benefits

Recognise and celebrate the best **examples of positive sustainable design** and development, which make Bath a liveable, green city.

Work in collaboration with independent experts to be an **active participant in public realm planning processes**, seeking to identify where improvements and changes to submitted designs should be made and why. This will consider all developments and plans which influence communities, the environment and the sustainability of the World Heritage City of Bath.

Provide a ring-fenced **budget for our Advocacy and Campaigning** activities, from internal resources and new income, enabling proper investment in the service.



## Objectives and Delivery

### Objective 4

**To be, and to be seen as, an open, inclusive organisation welcoming all who share our passion for Bath and its wellbeing.**

We will:

Reinvigorate and refresh the **Membership Scheme**, re-branding and promoting the offer to new audiences and offering additional benefits following the refurbishment of all museums. We will consult with members on our activities and issues relating to Bath.

Provide focused and **coordinated PR and Marketing** to improve the recognition of our work and how people perceive BPT. This will include a full refresh of our websites and social media channels to make information more accessible and integration with onsite content.

Undertake **access audits and qualitative reviews** through consultation and engagement with visitors to all physical and digital sites. We will seek methods to engage with potential new audiences whilst also retaining the new local audiences we have gained as a result of Covid-19.

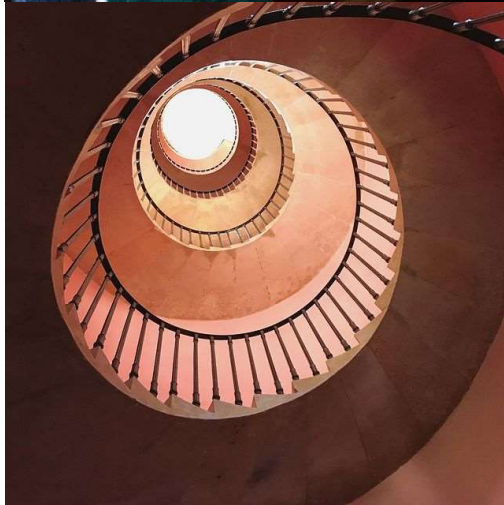
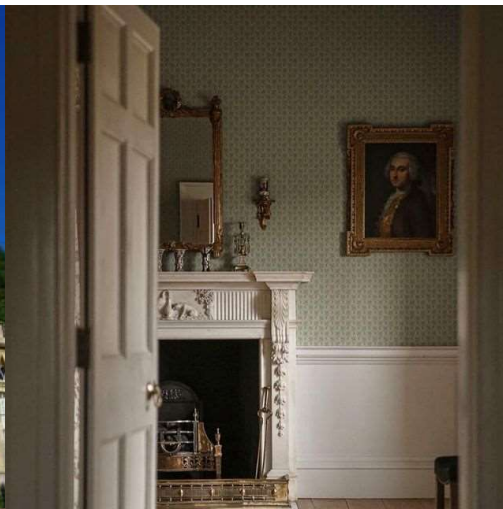
Ensure that the principles of **Equity, Equality, Diversity and Inclusion** are at the heart of everything we do, producing an EDI and anti-racism action plan, reporting progress annually.

Continue the process to **broaden the diversity of our Board of Trustees, our staff, volunteers and advisors** as well as our governance arrangements. The purpose will be to include more people in decision making relating to the services and experiences we provide.

Use our **public programming and temporary exhibitions** as an opportunity to engage with as wide an audience as possible, presenting compelling stories and events to share inspiration and understanding about the international importance and role of Bath and its people.

Review all of our **recruitment processes for staff, volunteers and trustees**, including how we advertise and promote vacancies, to remove any inherent bias. We will routinely peer review internal procedures for all staff to ensure these continue to be fit for purpose.

Invest in our staff, volunteers, trustees and advisors to ensure they receive **training and Continued Professional Development (CPD)** relevant to their roles, ensuring BPT continues to be relevant and is well equipped in its leadership role.





## Catalysts for the delivery of our objectives

### Resources, buildings and collections

- The Countess of Huntingdon's Chapel is an iconic and unique building with immense potential to become the staff hub as well as being a versatile learning centre, and base for our Advocacy and Campaigning activities, and an Accredited Museum.
- All buildings provide engaging and enjoyable visitor experiences which are subject to continual enhancement, with more areas accessible as part of the visitor route.
- The Bath Buildings Collection is unique but requires investment and space to grow to achieve its full potential, for cataloguing and research leading to loans and temporary exhibitions. Contemporary collecting will see the resource grow.
- Our extensive archives provide an outstanding record of planning applications and consents, development and change throughout Bath providing a narrative to accompany the thousands of historic buildings in the city.
- Our resources and assets include the knowledge and skills of our people, our unique buildings and sites and our collections. All of these add value to our relationships with members and partners and continue to have greater potential than is being realised.
- Our museums and collections are Accredited as part of the Arts Council England scheme.

### Diverse and engaged audiences

- People are at the centre of our charitable objectives and we seek new ways to sustainably grow visitor numbers whilst evolving our storylines and interpretation. Evaluation of performance and potential is based on Audience Finder metrics, contributing to national data.
- This data collection and evaluation ensures a close correlation with satisfaction and expectations and provides a strong evidence base and tool through which to diversify audiences and our offer.
- Independent advisory panels are engaged at each museum to democratise and enhance the process of continual improvement and public programming.
- Our members are active and involved with our activities, representing a significant level of support for and endorsement of our activities.
- Staff receive training about Equalities, Equity, Diversity and Inclusion, including a strong focus on anti-racism, to eliminate any risk of bias, encourage internal diversity and to enhance our visitor welcome and narratives of difficult histories.
- Our museums are safe spaces promoting wellbeing and providing a welcoming, supportive and inclusive environment for all people to broaden the diversity of our audiences.



## Catalysts for the delivery of our objectives

### Positive partnerships

- BPT is an engaged and active heritage sector partner, which leads, contributes to and learns from initiatives which positively support and enhance the community, economy and environment of Bath.
- The World Heritage Site (WHS) designations are celebrated and we enable the governance and delivery of the WHS Enhancement Fund, and the creation and implementation of World Heritage Site management plans.
- Academic partnerships provide an opportunity to advance our knowledge base and share expertise.
- Engagement with tourism networks and group booking providers in the UK and internationally extends our reach and demonstrates the global value of Bath's heritage, culture and environment.
- We develop the relationship with existing and new members to realise the benefit of their engagement and advocacy.
- Our sites and collections enable work with diverse groups for training and learning, support people's health and wellbeing and provide volunteer opportunities.
- Ethical financial partnerships support our objectives and help BPT to safeguard heritage and deliver our charitable aims.

### Staff and volunteers

- Salaries and staff benefits are competitive, securing the best candidates with an attractive array of non-salary benefits including family friendly and flexible policies.
- BPT encourages and supports staff to maintain CPD, career training opportunities and to actively engage with relevant networks.
- BPT is democratic and inclusive of the views of all staff and its many advisors, contributors and volunteers.
- Internal communications and collaborations will be improved through our ambition to create a primary central work base for staff at the Countess of Huntingdon's Chapel.
- Staff are supported through the BUPA Employee Assistance Programme and Mental Health First Aid is to be provided.
- Our staff are a vital asset and a trusted and reliable knowledge resource creating an extensive organisational memory. Areas of expertise reflect BPT's work, the social history of Bath and its global influence and the context of the role of heritage for people and the future.

## Catalysts for the delivery of our objectives

### **Budget and fundraising**

- Commercial opportunities are sought and maximised throughout all areas of the business without compromising the charitable objectives or integrity of BPT.
- Financial reserves are increased and sustained for future investment in business development, property and acquisitions, where they may provide additional new income.
- BPT innovates to sustainably develop new areas of operation and is receptive to new opportunities.
- Aspirations are managed according to capacity and BPT grows proportionately in response to need and with the availability of resources.
- Fundraising through grants, legacy programmes and public appeals is targeted to advance new projects and service enhancements with the scale of capital requirement envisaged described under 'Financial Planning'.
- BPT is financially independent and each section of the organisation will seek to operate sustainably, contributing to central costs and future investment to enable and maximise the delivery of our charitable objectives for public benefit.
- Our relationship with members is strengthened and developed with a legacy giving programme developed which creates opportunities to support long-term conservation of heritage.

### **PR and Marketing to communicate our message**

- An integrated marketing strategy maintains the prominence of our work whilst growing visitor numbers and the reach of BPT
- The website should be seen as our central source of communications and a destination for digital visitors connecting through engaging social media channels, as well as a means of enhancing the accessibility of our collections and narratives.
- Communications are appropriately targeted and demonstrate our knowledge and expertise, engaging with scientific and academic communities alongside mainstream audiences
- The work and ethos of BPT is promoted through engagement with national campaigns and celebration events
- The reach of BPT is perpetuated and enhanced through our use of external agencies, as a more cost effective approach to add capacity
- Our website is optimised to realise the value of visits arising from national and international referral agencies





# Impacts and Sustainability

Our Vision to 2030 will achieve the following impacts and sustainability statements

## Social

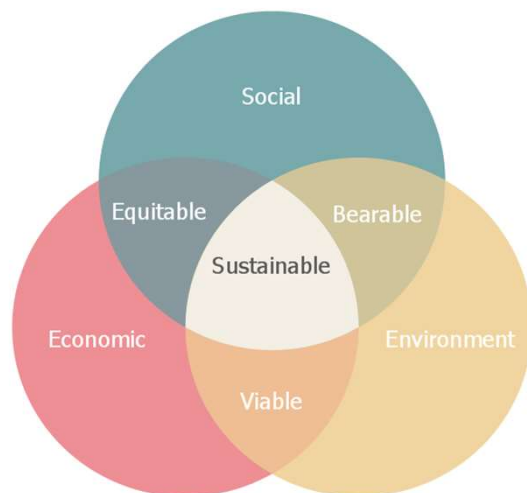
- **Community engagement and consultation** informs our Advocacy and Campaigning, Museum and Learning activities
- Museums, heritage experiences and our focus on Bath engenders a **Sense of Place** – locally, regionally, nationally and internationally
- Representation of heritage is communicated from a **de-colonised perspective**, reflecting multiple voices and views
- **Lifelong learning** is embedded in all activities
- **Equalities, Equity, Diversity and Inclusion** guides all activities and our museums are welcoming and safe spaces for everyone
- The Trust develops and grows its **collections** ethically
- Independently raised income is reinvested in **social actions** which benefit people
- Fair pay, career development and **responsible employment** is provided
- The **mental and physical health and wellbeing** of people is supported
- Creative approaches are used to engage **new audiences**
- The value of **social networks** for volunteers, staff and audiences is recognised

## Environment

- BPT is following a coordinated and costed plan to achieve **net zero carbon** emissions across our historic properties
- The use of **single-use plastics** in our business is eradicated
- **Local supply chains** and local spend is prioritised as a net contributor to the economy of Bath
- **Green travel** options are provided and promoted for staff and visitors
- BPT drives positive adaptation in our operations, implementing **retrofit** linked with **behavioural change**
- **Sustainable and green skills** are shared through our learning programmes
- We work with partners, homeowners and sectoral experts to fully understand and promote the value of the **embodied carbon** in historic buildings
- The heritage of Bath is **valued, respected and conserved**

## Economic

- Bath Preservation Trust is an **independent charity**
- **Income growth** is greater than inflation
- BPT is a net contributor and enabler for the **local economy**
- Target **annual turnover** reaches £1.8 million
- **Diversified income** sources provide greater security and resilience
- BPT invests resources in the **sustainable maintenance, adaptation, future resources and growth of its business**
- **Investment funds** support ethical businesses and markets
- **Baseline turnover** is increased from property and investment income
- BPT aims to grow its **financial reserves** each year becoming more resilient



The model of sustainability







## Delivery, Monitoring and Evaluation

### Business Plan

The delivery of the objectives will be more fully detailed in a 3-year rolling business plan, refreshed annually. The business plan is intended to be a common reference point but will also be influenced by the operating context within which we work. It will therefore need to be a dynamic and flexible tool rather than a rigid list of actions.

The activity plan will include:

- Individual activities to deliver the headlines within each of the four objectives
- Lead Officer, contributors and partners
- Indicative timetable
- Funding and resources required
- Outcomes

### Strategy Review

The strategy should be refreshed mid-way through its intended duration, in 2025/2026. The review should consider achievements, challenges, the contemporary operating context and future opportunities and activities. Of particular focus should be outcomes and the social, environmental and financial impacts.

### Governance of delivery

Our strategy will be owned by the Trustees and Senior Management Team. The work will be driven by the SMT as will day to day delivery. Trustee committees will have the overview of specific areas of activity and Advisory Panels will contribute to relevant areas according to their specialisms.

Outcomes will be reported to and discussed with Trustees at Board and Committee level. Impact reporting will focus on the difference made through our social, environmental and financial impacts, which will feature in annual reporting to Members and to the Charity Commission.

KPI	Unit of measurement
Visitor numbers	Visitor figures per site Return visits Demographic analysis
Digital engagement	Website visits and dwell time Social media reach
Learning	School children and visits Lifelong learners and sessions
A&C case load	Policy responses Planning application comments Advice requests
Publications	Number and circulation
Events	Attendees and number of events
Income	£ / business area
Spend per visitor	Admissions income Non-admissions spend per visitor (SPV)
% tourism reach	Bath / regional
Qualitative criteria	Visitor satisfaction Review ratings
People	Staff and volunteer turnover and retention Volunteer numbers and hours Employee satisfaction Volunteer satisfaction Demographic / protected characteristics data





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