



MOUNT STUART TRUST STRATEGY DOCUMENT 2023-2027

TIMEFRAME: 5 YEARS

1. CHAIR'S FOREWORD:

Innovation is central to our vision, whilst care and best practice as a charity are integral to the operation of the Trust. This document aims to set out where we are now, what we do, and our strategy for the next five years.

Sophie Crichton Stuart

2. STRATEGIC FRAMEWORK:

OUR VISION

To play our part in promoting an island that cherishes its history, optimises its present and ensures its sustainable future.

OUR MISSION

- Conservation of and public access to Mount Stuart house and gardens
- Sustainable conservation and regeneration of the rural environment, farming and woodland
- Multi-faceted arts and education programming
- Community engagement
- Public benefit

OUR VALUES

Transparency, communication, adaptability, diversity, responsibility, and commitment to best practice and public benefit in all areas.

OUR HISTORY

Mount Stuart Trust was founded in 1989 by John Crichton Stuart, 6th Marquess of Bute (1933-1993), with the aim of entrusting the historic Mount Stuart house together with the land and resources, previously comprising the Bute Estate, to a charitable Trust governed by a board of Trustees. The Trust is committed to conservation, environmental sustainability, innovation, public access, and education within our practical means and

financial sustainability. Mount Stuart house and gardens have been open to the public since 1995. Mount Stuart Trust is a charity whose aims and objectives are outlined in the Memorandum and Articles of Association (*Appendix 1*).

3. 5 YEAR STRATEGIC AIMS:

- a. Recover and rebuild from the impact of Covid-19
- b. Play a central role in the development of a creative, responsible, and dynamic community through community engagement
- c. Develop and support a thriving and diverse farming and food sector with a commitment to biodiversity
- d. Complete Land Management Plan
- e. First phase of 10-year property repairs and maintenance programme
- f. Phased carbon and environmental audit
- g. Deliver net zero in line with government guidance by 2045, if not sooner
- h. Deliver a high-quality impactful arts and education programme
- i. Build and nurture a team that fits the Trust's ambitions
- j. Focus on resilience within current economic challenges

a. *Recover and rebuild from Covid-19:*

Recover from Covid and the furlough programme with a phased and mentored return to work, at home and in the workplace. Expectation of a slow recovery in all areas of tourism and hospitality; re-entry requires flexibility and collaboration with key stakeholders. Sustainability across all budgetary planning is a key target. Focused revenue growth and responsible expenditure. Regeneration across all fronts. The pandemic has highlighted efficiencies from which we can continue to benefit. Disseminate and generate the most effective visitor market for Mount Stuart. Explore funding initiatives.

b. *Play a central role in the development of a creative, responsible and dynamic community:*

Collaboration with key community stakeholders and people such as Bute Kitchen, The Pavilion, Isle of Bute BID and Argyll and Bute Council. Support local growth and initiatives. *Lochend*, on the shores of Loch Ascog, is a Mount Stuart Trust sustainable living development recently completed as a pilot for a series of sustainable, designed housing projects, built to attract renewed community life to the island and work towards improving the island's recent demographic emigration. The second sustainable living development will take place in collaboration with R-House (*Appendix 2*). Mount Stuart itself is a hub for community events throughout the year. Community development is key to our strategic aims.

c. *Develop a thriving and diverse rural, farming and food sector with a commitment to biodiversity:*

Delivery of new modern tenancy leases across the farming sector on the island, attracting new entrants to the community and providing opportunities to existing tenants. Encourage and develop diversity, including agro-forestry. Routine communication and teamwork with tenants. Commitment by the Trust to the Dairy sector and the *Bute Dairy Group* founded in

2019. *Bute Dairy Group* consists of seven of the Island's dairy farmers, works with ABC Consultancy and has completed two years of carbon audits. The next development is the formation of a *Beef & Sheep Group*. Continue to develop the ranger service which encourages proactive dialogue between farming tenants and the Trust and enables timely feedback and collaboration on specific logistical issues such as fencing, drainage, and animal welfare. Increase diversity and quality of property and land ownership on the island, underpinned by a rolling 10-year property plan. In conjunction with the 10-year Property Plan we will draw up a Land Management Plan. Forestry strategy is based on a sustainable model, to include a large percentage (at least 60%) of native broad leaf planting (*Appendix 3*). We will consider areas of new planting which will qualify for carbon credits. Ongoing development with the food sector, mainly Bute Kitchen, ButeYard, and the Mount Stuart visitor and hospitality offering. Celebrate the food offering on the island, makers, and suppliers.

d. Land Management Plan:

In progress.

e. Sustainability and Carbon audit:

Mount Stuart Trust is working with consultancy ADAS on a phased carbon audit and strategy across the Trust's assets: Mount Stuart house, rural and residential holdings; and the assessment of natural capital and biodiversity. The preliminary audit is due to be completed February 2023. Mount Stuart Trust aims to be an exemplar organisation in regard to carbon reduction planning. A renewables project is currently under review.

f. Deliver net zero in line with government guidance by 2045, if not sooner:

As above.

g. Develop an arts and education programme that is impactful, community focused and high profile:

Aim to achieve best practice in collections care and curatorial practice, with loans and partnerships developed. The Trust runs a series of researched educational events, talks and exhibitions centred on the historic Bute collections and archives. The *Contemporary Visual Arts Programme*, inaugurated in 2001, aims to promote and facilitate interest in the contemporary visual arts and bring exhibitions of an international standard to Argyll and Bute. Complementing each exhibition is a programme of community events and educational activities. Each winter the Trust runs a residency for socially engaged and community-based practice via an open call to recent graduates based in Scotland. We aim to develop existing initiatives further with opportunities of co-commissioning and touring. Continued support for the curriculum at local schools; links with higher education and doctoral research.

h. Build and nurture a team that fits the Trust's ambitions:

Our people are valued through corporate policies which place emphasis on mutual respect and internal communications. Training provided on request and according to best practice.

Equality, Diversity & Inclusion and Respect in the Workplace are required training for all employees. Standardized contracts, HR protocols, Mount Stuart Trust Memorandum and Articles of Association and ED&I statement are issued to each employee. Team building and employee well-being are a priority. The team are expected to be fully engaged, consistent, adaptable, positive and accountable. Clear organogram with employee structure and line management. Employees are arranged under the executive a) Head of Visitor Operations: Collections, Visitor Operations, and Gardens and b) Head of Rural Operations: Farming, Property, Forestry and Sawmill, who answer directly to the Board through the Chair. Root and branch communication is integral to this structure. Additionally, the board is arranged into a skills matrix corresponding to the respective departments in order to maximise value from the board and to further encourage root and branch dialogue. The board is composed of a mix of people representing the wide areas of interest spanned by Mount Stuart Trust and members of the Bute family to foster cultural continuity of the Trust's foundational aims and innovative thinking (*Appendix 4*). Governance is reviewed annually to ensure best practice.

i. Focus on resilience within current economic challenges:

Regular focus is applied to financial analysis given current inflation and cost of living crises. Adaptability is key.

4. AUDIENCE AND BENEFICIARY DEVELOPMENT

Tourism:

To expand our audience by focusing on families, millennial travellers, the travel trade, and luxury travel aiming to keep independent travellers for longer periods of time with the broader island offer (*Appendix 5*).

Arts and Education:

To expand and diversify our audience and beneficiary base through further collaboration, partnerships, and communication.

Overall strategy:

Work with external stakeholders and partners to improve island tourism and the interconnected quality of island life, for example Isle of Bute Business Improvement District (BID). Attract a younger demographic to the island with an attendant entrepreneurial energy.

5. EXTERNAL PARTNERS

Community groups: Bute Dairy Group, Rothesay Pavilion, Bute Community Council, Isle of Bute BID, Bute Kitchen, ButeYard and Bute Community Woodlands.

External stakeholders and funders: Argyll and Bute Council, Historic Environment Scotland, NatureScot, Scottish Forestry, Creative Scotland.

Land Reform: Scottish Land Commission, Scottish Land & Estates, Tenant Farming Commissioner, National Farming Union.

Tourism: Visit Bute, Argyll and Islands Tourism Co-operative, Association of Scottish Self-Caterers, Historic Houses Association, Scottish Tourism Alliance, The COIG, Event Scotland, Calmac.

6. UNDERPINNING STRATEGIES

Communications and Audience Development

Current web and social demographic are predominantly in the 25-40 or the 55+ groups. The 55+ group converts to our main visiting market. The main aim in Communications is to create conversions from wider groups (mainly the highly engaged 25-40 market) into ticket sales and stays at Mount Stuart and on the island.

The web/social demographic has been mainly based in West Scotland, Edinburgh and London. We will work on achieving conversions between people in wider geographic areas. In order to do this, we will market ourselves as a 'package'. Whether visitors are couples, solo travellers or families - Mount Stuart will be seen as more than a visit to a country house. Ease of travel, accessibility, the self-catering offer, educational initiatives and Bute as a destination for great local food and drink, and artisanal producers will be promoted together with local stakeholders e.g.: Bute Kitchen and Isle of Bute Distillery. Internally, the Trust is split into four areas with goals for a diverse audience target: Arts, Rural, Gardens and Learning. Our goal is to ensure each is visible across our platforms and contributing to our overall offering.

We have a Communications Working Group which meets regularly and consists of a representative from each department to share knowledge, ideas and upcoming opportunities for cross collaboration, both internally and externally. Communications progress is monitored and circulated to all internal stakeholders on a monthly basis.

Existing press and marketing drives will be boosted on a needs basis by external PR resource to focus on specific Trust projects, with the aim of delivering targeted national and international publicity.

Community Engagement

Community engagement involves the Trust's ongoing connection and activity at various levels with community stakeholders and people: school, nurseries, local community centres and groups, cross-sector groups, local authority provision, community sports, housing, the farming sector, and employment and apprenticeship opportunities.

The Emerging Artist Residency in Socially Engaged Practice is now in its fourth year. The respective artists have brought different approaches which have broader lessons for our own future practice in community engagement.

Looking forward, we continue to work at building and maintaining relationships across the range of stakeholders on Bute – work which we consider to be of vital importance. Public consultation and benefit are a mainstay of community engagement. Currently the Trust is working with Lucy Laidlaw Communications to roll out our community engagement strategy (*Appendix 6*).

The Contemporary Visual Arts and Learning Programme

Education is a powerful tool. The Trust supports learning in a variety of ways and places it at the centre of everything we do. Currently education and learning cover the following key areas: visitors; schools and colleges; practical skills and continuing professional development; academia. We have a wide range of external links e.g.: Glasgow School of Art, Glasgow University and the Paul Mellon Centre for Studies in British Art. Spanning all of these areas is learning related to the *Contemporary Visual Arts Programme*. Learning content tends to be specific to each project, however there are key constituencies with whom we regularly work. These include primary and secondary schools, further education colleges, art schools and colleges, universities, the local community, learning disabled adults, visitors, families, and specialist visitors. Education forms a major component of funding applications to public funding bodies, foundations, and trusts. We will continue to develop community and academic relationships through working with artists and key events such as workshops, talks, performances and symposiums. Post-Covid, we are looking to develop new structures across our programming, including virtual platforms. We continue to develop the *Contemporary Visual Arts Programme* and aim to maximise its reach to audiences, local, national, and international through partnerships. We aim to integrate and support the arts community on the island. We value the integrity of the programme and commit to further diversity in our programming and educational initiatives.

Collections Care Plan and Curatorship

The unique architectural and decorative significance of the house is significant, easily accessible as an inspirational resource for the public and additionally an important resource for academic study and research.

Mount Stuart Trust manages and conserves the Bute Collection which is owned by John Bute, the current Marquess of Bute and his successors. An agreement is in place between the parties. Access to this collection is a major benefit to the Visitor Operations, and a valuable resource for our Learning Programme. The Collections Care Plan ensures that the Housekeeping Team has the expertise, support and training to confidently execute and document conservation best practice. We create routines for cleaning, environmental monitoring, and pest control. We implement a collections management system that optimizes efficient internal processes; we integrate information across Archives, Collections and Library to enable the capability to provide online public access in the future. Rationalization of storage areas and the ability to stabilize their environmental conditions is a key consideration.

It is our priority to increase the accessibility of the collection for all audiences and curate inspirational spaces where visitors can engage with the collection in line with the Trust's commitment to learning and innovation. Strategy includes: reinvigorating the permanent

room displays while maximising public access with interpretive approaches (including digitally); a temporary annual exhibition and events programme to attract new audiences; tell new stories and complete object based research; introduce new themes, objects and juxtapositions to connect the histories of different periods and cultures; decolonize the collections and archive¹; advance scholarship; champion educational partnerships to support the dissemination of research in the Bute Collection and Mount Stuart; support a strategic programme of external loans understanding that each should support our collaborative objectives.

Gardens and the Living Collections:

The Living Collections are a source of pride for Mount Stuart Trust. The gardens consist of the designed landscape and woodland, the ornamental gardens *Rock Garden* and *Wee Garden* and the *Victorian* and *International Conifer Conservation Programme* pinetums. There are parallel and detailed sources of reference in the archive which record the histories of the gardens, spanning eighteenth through twentieth century developments.

Rare species are contained throughout the gardens. The *International Conifer Conservation Programme* is a world leading, ongoing conservation programme initiated by The Royal Botanic Gardens Edinburgh, of which Mount Stuart became one of the first pilot sites thirty years ago. This ex-situ planting of endangered species is important work. Mount Stuart gardens contains groups of planting according to country, and with particular dialogue currently with Chile.

Risk Management

Risk Management is reviewed and managed onsite by the Risk Management Committee. The Committee manages the following key documents for Mount Stuart Trust Risk Management: risk assessments, method statements and incident reporting.

Constituted of key personnel from each department and a representative from the board, our Risk Management Committee meets monthly with the task of ensuring the above documents are current and to review any incidents which occur during the period. An incident reporting protocol is in place to ensure any incidents are recorded, dealt with appropriately, to review any lessons which can be learned, and changes duly implemented. The Trust engages with an external company, Ecosafety Ltd, to review and monitor general Health and Safety management across the Trust's businesses. A quarterly audit is undertaken and reviewed by the Risk Management Committee to implement any recommendations. Risk Management forms part of the agenda at quarterly board meetings.

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The ambition is to apply constructive post-colonial thinking to the collections and archive on public view at Mount Stuart. This discourse applies to research, interpretation, education, and exhibitions, and is aligned to the Trust's aims and objectives regarding public interest and accessibility.

Fundraising and Grant aid

Gift Aid: As a charity the Trust benefits from the ability to claim gift aid on donations (ticket sales). An additional 25p can be claimed for every £1 gifted. To be eligible for gift aid we must either charge 10% over and above our standard ticket rate or offer free entry to the attraction for 12 months. We do the latter. Gift Aid claims require a visitor's name and address to be processed and stored electronically; this data is held securely in line with GDPR and audited yearly. Moving forward, we anticipate a large shift from on-site to online ticket sales which may cause Gift Aid conversion to dip. It is therefore vital to communicate our charitable status through our website and communications. If visitors understand 'why' they are more likely to engage with Gift Aid.

The *Contemporary Visual Arts Programme* applies on an annual basis to Creative Scotland's Open Funding Stream and to other foundations and trusts, e.g: Stichting West Coast Foundation, Art Fund and Henry Moore Foundation. We continue to apply to other relevant foundations and trusts.

Generally, to achieve our objectives, our strategy is to explore and apply for relevant and appropriate funding strands. Since April 2020, the Trust has received financial support from the Coronavirus Job Retention Fund to support the staff costs while the business has been closed/impacted by the pandemic and staff have been furloughed as a result. Since December 2020, the Trust has received financial assistance via Argyll & Bute Council and the Covid-19 Strategic Framework Business Council to support the areas of the business that have been forced to close as a direct result of the pandemic.

Equality, Diversity and Inclusion

The Equality Act 2010 protects the rights of all against discrimination and in the interests of best practice Mount Stuart Trust is pursuing three areas: The Equality, Diversity & Inclusion policy statement; ED&I training; monitoring of policy and practice.

In November 2020 the Trust published its policy statement, included in the Employee Handbook, added to staff induction plans and distributed to all staff members. To educate staff and promote the ED&I policy statement the Trust reviewed training options, selected an on-line interactive training module provided by Cylix with completion testing and certification, phased for participation and completion by all members of staff by the end of March 2021. The training platform covers the seven protected characteristics of the Equality Act 2010 and the identification of bullying, harassment and victimization behaviors with examples of practical scenarios.

Ongoing monitoring of the policy and its implementation is undertaken during recruitment activities and decision-making processes in relation to people and events. ED&I forms part of the agenda at quarterly board meetings.

7. STRATEGY REVIEW PROCESS

Reviewed in quarterly reports to the board, including quarterly board meetings. Executive and board decisions informed by overarching strategy document.

8. BOARD GOVERNANCE

Board memberships run for three-year terms which are mutually reviewed at the end of each term. The board is arranged into a skills matrix corresponding to the respective departments in order to maximise value from the board and to further encourage root and branch dialogue. The board is composed of a mix of people representing the wide areas of interest spanned by Mount Stuart Trust and includes a limited number of the Bute family to foster continuity of the Trust's foundational aims. Board reports are distributed quarterly, management accounts monthly, and board meetings take place quarterly. The board is responsible for healthy governance, charity law compliance and overall continuity of strategy.

Annual accounts and directors' report are filed at Companies House. The appointment and resignation of directors should be submitted to Companies House within 14 days of receipt. Corporation tax returns are filed annually. Also filed for HMRC: Gift Aid claims, VAT returns, PAYE submissions via payroll and P11D's. Tax returns are filed, and this includes the Museum and Galleries Exhibition Tax Relief claim.

OSCR (the Scottish Charity Regulator) annual return which includes the accounts. Charity law is an integral consideration in the governance and decision-making process. We take advice from Gillespie McAndrew's charity arm.

END.

Appendices:

1. Memorandum and Articles of Association
2. Gallachan housing project
3. Forestry plan
4. Board Bios.
5. Audience Development Plan
6. Community Engagement

This document and appendices can be found on The Mount Stuart Trust website at: <https://www.mountstuart.com/governance/strategy>