



(DRAFT) TEN YEAR STRATEGY

FOR EVERYONE EVERYDAY

Draft 7 (following discussion at trustee meeting on 28/11/19)

(edited after comments from G King)

(edited after Coronavirus lockdown, March 2020)

Draft 8 (edited by X Arvanitakis)

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PREFACE – THE CORONAVIRUS STRIKES

ON 1ST MARCH 2020, THE TRUST SEEMED IN A GOOD PLACE AND THE HOUSE AND GARDENS SEEMED TO HAVE GOOD PROSPECTS FOR FURTHER IMPROVEMENT AND FURTHER DEVELOPMENT OF OUR CHARITABLE AMBITIONS.

A new director would arrive on 2 March. We had two other new senior members of staff; we had successfully filled two gardener vacancies with good recruits. We were on course to finish the year at end March 2020 with a healthy surplus. We had adequate reserves. The re-construction of the Board of Trustees, carefully planned over 18 months had gone well and two recent great trustee appointments from a large field of over 70 applicants proved again how much the estate is loved.

The 20/21 public events programme was in place; a new cafe operator is busy implementing a new menu and planning other improvements. A brand new state of the art security system around and inside the House meant we could be confident we could re-deploy staff time away from House monitoring to better community use and outreach activity.

We had made an offer to English Heritage trust to co-fund a major investment in the House as a visitor attraction.



We had completed important if incomplete repairs to the Conservatory and had bought forward our popular Camelia festival with a host of blooms as good as any in recent years.

We were proud to have won another collection of awards in 2019 including Heritage Park and Gardens; Walled Garden of the Year and an Allotment Award.



We are all proud of the fundraising efforts of the Friends of Chiswick House and Gardens. Their leading trustees had welcomed early drafts of this strategy. They were keen to work closely with us on a final version. They had recently agreed to donate £10,000 to improve planting around the entrances to the Gardens.

I think it fair to say that all involved in the Estate were upbeat, optimistic, energetic and confident.

Then we had a global pandemic.



We do not know how many of those who loved these Gardens and House have been seriously ill or may have lost their lives or lost loved ones. But we grieve with them for their loss.

And against such personal losses and widespread alarm and fear, and in a time of extraordinary commitment by NHS and Care staff and other essential workers we understand our own ambitions for and worries about our charity seem pretty parochial.

But we have staff to worry about and a 65 acre Garden to keep going and a 290 year old House to conserve. Life goes on and indeed we know at a time when exercise has seemed more precious, how important it is that the Gardens stay open.

The Trust exists only to sustain charitable objectives which conserve the internationally important architecture and landscape and make both available to people from near and far to learn; to be inspired and to enjoy a beautiful place.



But as we write in July 2020, all of this is at risk. Our Trust finances require us to earn 75% of our income from trading and fundraising. Whilst we remain grateful to our key funders-the LB

Hounslow and English Heritage Trust, their funding is not enough to pay all our bills.

And right now we are in the same position as many other businesses particularly those in the hospitality sector. We await to see whether any of our carefully planned 20/21 events programme is possible; we hope we might yet host at least some of our postponed weddings; we hope some cricket might be played.

We are struggling to feel confident about how the next twelve months might play out. We have already cut costs drastically. We are launching a fundraising drive.



But we are also conscious that the Estate has survived for nearly three centuries, though the grievous flu pandemic of 1775; the cholera epidemic of 1832 and Spanish Flu in 1918; through two world wars; outlasting the reigns of eight monarchs from the Stuarts to the Windsors. The House was built in the period of Britain's first Prime Minister, Sir Robert Walpole and 75 others have held office since then. We have prevailed; we will prevail now.

We will not let the Estate suffer harm on our watch. Indeed we are determined to see it flourish and for our charitable works to bring its joys to a wider audience.

To do this we need your help.

To inspire your help we want to lay out our ambitions as far as we had agreed them up to the beginning of 2020.

What is possible remains to be seen; but without ambition we will drift. Do let us know what you think.

INTRODUCTION

This strategy serves to plot a way forward for Chiswick House and Gardens Trust over the next ten years. It commits us to a renewed Vision and a new Mission to deliver, with due regard to the opinions and trust of others. It is designed to give us more confidence to make choices and commit to a modern version of heritage management with enhanced and wider access, relevance and popularity. The arts, design, history, education and the natural environment will be enjoyed throughout the estate.

It discusses the six big strategic plays to transform our Vision into reality; six big revenue enhancing elements and the six indicators of a healthy Trust. It illustrates estimated changes in income and expenditure over both five years and more speculatively, ten years. It commits us to exploring major capital expenditure through a new visitor facility; a renewed Conservatory; auxiliary catering points and a re-presented House with disability access.

The 2020 Coronavirus crisis undermines our confidence in predicting the future but strengthens our resolve that ambitious planning is still important even if plans take longer to realise.

It is an exciting strategy, capitalising on the enthusiasm of our funders and landlords; the energy of new trustees and senior staff and a sense that our fundamentals are strong but our future prospects even stronger.

We aim to be open about our hopes and willing to listen to the ambitions and if necessary, the fears of others. The strategy is a direction of travel. Many detailed plans need to be agreed in the years to follow.

Through a period of consultation and discussion we aim to conclude our strategy by the end of 2020.





Background

The last business plan for Chiswick House and Gardens Trust (CHGT) was published in November 2016 and was written as a supporting document to a bid to the then Heritage Lottery Fund, now called National Lottery Heritage Fund (NLHF), to be made in 2017.

That bid was a follow up to a successful earlier bid whereby NLFH and other private and voluntary sponsors provided funds for major improvement and recovery works to the Gardens which were finished in 2010.



The NLHF second bid sought support for a new wing to be built onto the original Burlington Villa and 'Link Building' to provide better visitor reception facilities including full disabled access, more retail space and better toilet provision. The bid would have improved heating, lighting and IT in the House, and transformed interpretation. The bid total was £7.3m with a hope that £4.5m would be granted from NLHF and £2.3m from fundraising. Some c£200,000 was earmarked from S106 funding obligations following local residential development but no other fundraising was achieved.

That bid was made in Spring 2017 and was refused a First Round pass on 26th September 2017 on the grounds that the application was premature; the case made was not strong enough and project risk was too high due to the absence of community engagement and fundraising.

That optimistic business plan now needs to be drastically revised particularly because it anticipated considerable investment in the visitor experience within the House. That investment has yet to happen.

The Local Management Agreement between English Heritage Trust and CHGT was signed in Spring 2017 and lasts for five years so we are in the second half of the agreement. We expect the Agreement to be renewed and at renewal there will be an opportunity to refine certain terms.

The agreement confers a number of expectations and obligations on the Trust. In furtherance of that agreement further responsibilities for ongoing maintenance and security transferred to the Trust with effect from April 2020.

The Trust is currently solvent and the business grew in 2019. Reserves are adequate, but will be severely depleted because of the loss of cafe and events income in 2020.

The Director Clare O'Brien left the Trust in January 2019. The Chair and eight other trustees have stood down since the last Business Plan and the Trust has adopted a new governance model with a smaller Board. Derek Myers took over as Chair of Trustees in September 2019.

Xanthe Arvanitakis joined as Director in March 2020.

Above:
Xanthe Arvanitakis
Director



A solid platform

We have a really strong group of volunteers who love to assist in the Kitchen Garden, with garden education, the wider grounds, the ranger duties, the Lake, House and Garden tours. About 160 individuals contribute hundreds of hours each year, sharing their skills and enthusiasm.

We have a devoted and enthusiastic staff group. We don't have all the staff skills we need but the individuals work very hard.

The Estate is generally in satisfactory order with some elements outstanding.

The heritage gardens won a Green Flag and another three London in Bloom awards in 2019.



Visitors continue to be appreciative of the Gardens and there is no great demand for change. The Friends who include those who visit the Gardens most frequently, are supportive of commercial events; like the estate as it is but accept the House is rarely visited by their members and has tired content and interpretation.

The cafe contractor completes a ten year use agreement in January 2020. Colicci, the new contractor has a great track record and will look afresh at the catering offer.



The Wedding Business which has grown from 10 couples in 2010 to 30 couples in 2019, bringing in revenues of c£160,000.

The 2019/20 events programme was the biggest, most commercially rewarding ever, with gross sales at c£570,000, up from £480,000 last year.

Income from voluntary fundraising has been up and down.

The Trust has benefited from a "resilience grant" from the National lottery Heritage Fund but an application to the National Lottery Community fund for support for volunteer programmes failed. We were more successful in requests for a grant towards Kitchen Garden education for junior school children; part support for conservatory repairs; small contributions to the renewal of the children's playground and for the implementation of a Knot Garden.

We have 25 Patrons and the Friends report 680 members, though only the former contribute directly to the Trust's revenue costs.

13,000 visitors



Some challenges ahead

We are currently failing to present the House in a way that is respectful to its importance, intrinsic beauty and history.

We have the use of the Grade I listed Conservatory which as well as housing part of our internationally recognised Heritage Camelia collection, is popular for wedding ceremonies. But the Conservatory is a high maintenance design which consists of a particular blend of fenestration, guttering and wooden supports which is not very weather resilient as more severe rain events become normalised. Responsibility for keeping this Grade I listed structure in good repair seems to have passed to the Trust under the lease from the Council, but currently the annual outlay necessary for this seems likely to be beyond the Trust's likely income.

We don't have a Conservation Action Plan for the House though we do have a condition survey dating from 2017. We want to strengthen our work on repairs and conservation with English Heritage Trust.

We have had around 13,000 visitors to the House last year (with the House open 4 days per week) compared to 16,500 in 2018/9 (with the House open 6 days per week) and against a target of 18,000. The last business plan anticipated visitation climbing to 24,000 in 2020 and 26,000 in 2027 but these figures will not be achieved without major investment, more opening days, better cultural programming and more marketing effort.

Our list of items requiring better maintenance is long, including gardens, paths, gates, signage, tenanted properties and some of the heritage statuary and buildings.

Though the core gardens are very fine with beautiful trees and planting, other areas would benefit from better planning and more time to improve standards. Our much loved woodlands, known as the 'Wilderness' should retain their natural feel but would benefit from more proactive woodland management. We have various plans that have been produced for various purposes over the years but will now produce an integrated Garden Plan for all 65 acres.

The facilities that support the House by way of toilets, access facilities, buggy parking and retail space are below the standards we want.

Our education offer is limited and dependent on external short term external grants. Ideally this should be a key enduring component of our charitable disbursements.

Our wedding business utilises a marquee that will need replacing in 2022.

We believe we can get more community access and sports education out of the cricket pavilion.



Our local area

In demographic terms we have some positive indicators. West London is and will remain an affluent area of choice for families and older long stayers. The area is cosmopolitan and varied with some long established Asian and Polish communities but newer communities too including various European groupings, Japanese, and Chinese.

In location terms our place close to certain Heathrow flightpaths is a reality which we cannot change. We are without question the finest green space in the Chiswick/Brentford/Acton/Hammersmith areas which are the areas most likely to supply regular visitors.

Our popularity with c1000 dog walkers, many who come every day, drawn by the variety of paths; open space for off lead walking and external seating at the cafe ought to encourage us to see opportunities to build loyalty and ensure folk have opportunities to take a coffee and are otherwise tempted to leave a financial footprint. The dog walking arrangements including certain controlled areas are mature and no changes are planned.

West London has been and will likely continue to be a place folk are drawn to when they aim to set up home or trade up in London. In the same way that Lord Burlington wanted a site out of London away from its noise and dirt, so west London continues to appeal as green, well connected and safe. Chiswick House and Gardens are a big selling point.

We may also be able to make more of the choices that generations have made since Burlington as to “Why West London”.

Local competition and complementarity

West London is well served with Heritage attractions and many of these have received or are receiving investment to improve their competitive offers. Chiswick House is amongst the oldest and has better gardens than others. We need to make sure our visitor offer compares well, but also look to combine with others to allow visitors a *Grand Day Out*, combining a visit to two attractions.

There could be opportunities to suggest combined visits to any combination of Fulham Palace, Chelsea Physic Gardens, Gunnersbury Museum, Hogarth House, Boston Manor House (when it re-opens) and Chiswick House.

Closer to the estate, the riverside pubs, Turnham Green Terrace and its independent shops and Hogarth House offer complimentary attractions.

Our target audiences

Chiswick House and Gardens is similar to other heritage attractions in that we naturally attract older, white, usually retired visitors. These will remain our core and we should celebrate that. However it is our duty to reach out to others who have never visited, particularly from other parts of Hounslow, our home borough.

We should also seek to attract west London family visitors.

The Trust procured a Marketing analysis in November 2015 which will still be valid. Chiswick House was found to have good brand awareness (4th out of a list of 16) but poor conversion of awareness to visits. The study reported only 1 in 10 of potential “heritage visitors” living in a 60 minute drive time had visited. The study thought that up to 2.2m might be tempted to visit by a better offer. Current visitors were found to describe themselves as knowledgeable. The cost of admission to the House was not found to be an obstacle.

Half of the day visitors used the cafe.

Interviews with visitors in 2015 praised the cafe; wanted more ‘dressing’ of the House; wanted the kitchen garden open more often and liked the idea of temporary exhibitions. The offer for children was reported as poor. Signage was described as inadequate.

Kew Gardens serves as proof that visitors can be tempted out of central London. Kew has carefully planned yearly ‘blockbusters’ which look great on large scale advertising.

Brexit

Leaving the European Union may have unknowable effects over time. It may affect our ability or that of our contractors to recruit staff. It may affect the small proportion of non UK visitors we receive. It may affect prices of supplied goods. It seems unlikely these will be very significant influences on the Trust finances.

The currency exchange rate may affect foreign travel into London.

Economic outlook

This plan assumes no real terms growth in either the London Borough of Hounslow or English Heritage Trust’s contribution to our core costs. The grant from Hounslow is guaranteed at the current level plus inflation, until 2033. Both organisations have other priorities and even though 2019 announcements from Government seem to indicate a wish to spend more on priority areas this seems unlikely to lead to more direct aid to the Trust.

However the Trust needs to stay alert to Mayoral, Borough or Government initiatives where we can make a useful contribution.

These seem likely to include Green initiatives; education initiatives and initiatives in favour of young people. The Trust wants to be relevant to peoples’ lives and should look for opportunities to do social good.

Rampant inflation would be difficult; interest rates are currently irrelevant as the Trust carries no debt.

The long term effects of the pandemic are speculation at present.



Getting strategic : What is the Trust trying to do?

The Trust was set up because there was a compelling ambition to manage as one historic estate the Gardens owned by the Council but including monuments owned by English Heritage and the House owned by English Heritage.

We will always be in debt to this far sighted conviction.

The bare bones of the strategic challenges are not complicated:

1. We need to re-present the House and wider estate to attract and educate and entertain more visitors. We need to be strong advocates to ensure the House and contents are well conserved and well maintained.
2. We need to have high standards of horticulture and arboriculture throughout the estate.
3. We need to encourage and allow use of the estate so people can take recreation; attend to their wellbeing and have fun.
4. We need to attend to our responsibilities for the buildings and structures on the estate.
5. We need to find a formula to do this in a way that is financially sustainable, environmentally responsible; respectful of our residential neighbours; mindful of our conservation responsibilities and fair to our staff.
6. We want our visitors and audiences to be diverse and for our charitable work to be relevant to all.
7. We want to work in a way which is accessible and accountable and receptive to ideas and challenges.



A REFRESHED VISION FOR OUR WORK

It helps to have a concise statement of our purpose and this should draw out our unique selling points. See the infographic at appendix 3 which explains the thinking.

Our vision is to be:

A special place to delight, educate and be inspired by our 300 years of stories of influence, design and environment. For everyone everyday.

And our mission is:

To conserve our historic, horticultural and natural heritage for our visitors, sustain and improve our biodiversity and support our local community's health and wellbeing.

Our unique selling point is that the estate is a wellspring of modern architecture and the English Landscape movement. Design as a fascinating, important characteristic of human life is well illustrated by Chiswick House and Gardens. The history of Design and modern Design can be a golden thread through our interpretation.

We believe Lord Burlington together with his collaborator William Kent were radical pioneers. Their ideas have resonated down generations. They helped create tourism where visitors wanted to see beautiful things created by man's ingenuity. They cared about natural and crafted beauty. So do people today. So do we.

Lord Burlington and the Dukes of Devonshire and subsequent occupiers of the House and estate were important influencers. They carried weight. They supported causes. They were active in politics. This influence altered the course of history and we want to tell those stories too.

We have nearly 300 years of history (more if you look for the history of the walled kitchen garden) and this includes decades of aristocratic use but also over 30 years when the estate was a radically different therapeutic community for those who were mentally unwell. The estate has already been in public ownership for 90 years and the centenary of this will be in 2029.

Ensuring financial sustainability

The last business plan foresaw the Trust needing a yearly revenue of £1.6m at 2016 prices. Assuming that figure needs to be adjusted by inflation it might be posited as £1.8m at 2019 prices.

It anticipated that of this figure some 76% would be earned income and the rest continuing financial support from EHT and LBH.



The Trust 2020/21 budget as agreed was expenditure of £1.37m and with an earned income percentage of 74%.

We need to agree a target operating model based on responsible financial provision to allow for the right size staff group including resilience for planned and unplanned absences; provision for subsidised public programmes, learning and community outreach activity; planned maintenance and renewals; funding for marketing and forward planning.; sufficient advice for the Trust to know its future options and to be a good advocate for the House.

It seems likely that we should plan to increase gardening capability; volunteer, learning and community leadership and support; administrative and event management resilience; educational provision and outreach and provision for community events that don't have to make money. Ideally we would seek to have a retained Conservation Surveyor to help us ensure the House, contents and statuary are always safe and in great order.

To complete this strategy we need to 'name the gap' between our current financial capability and the target capability to deliver our mission.

The first draft of this gap is £999k. See Appendix 1.

The strategy then seeks to close this gap.

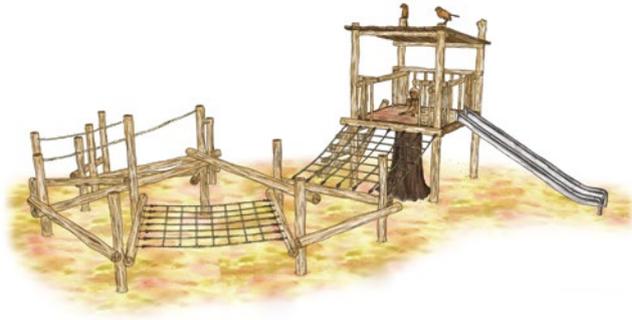
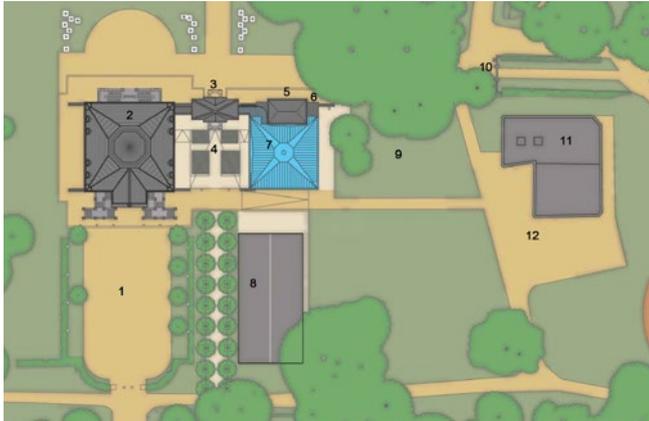
Again the component parts of our strategy will not be difficult to name and follow some themes from the last business plan:

1. Increase revenue and margin from our catering and external events business
2. Increase the volume and margin from our private event and wedding business
3. Increase revenue and margin from all our retail activities
4. Increase revenue from admissions and secondary spend from more visitors to the House
5. Secure regular unrestricted income from individuals including Friends, Patrons and perhaps a new intermediate tier of enthusiasts
6. Expand our income from our property assets
7. Long term sponsorship from a small number of commercial partners

A first draft of possible improvements in income lines suggests we might optimistically grow income by £430K over the next five years. See appendix 2.

However it seems unlikely that substantial improvements in our income lines will arrive by doing the same things slightly better. We need to be bolder.

SIX BIG STRATEGIC STEPS



1. A new visitor Pavilion by 2029

If we are not going to revisit the 2016 idea of a new wing on the House, which has many obstacles in its path, we still need to address the same visitor deficits. We need better space for receiving visitors, providing them with modern facilities and engaging them with our history. Such a facility might be combined with space to allow us to run cultural programming, attractive to current and new audiences. We should begin to look at options for a stand-alone facility within a short walk from the House. We should call this our visitor Pavilion. This new venture is the largest innovation in this strategy and is key to our mission and financial sustainability.

2. Develop our Kid's Outdoor Play by 2022

We have plans to renew the children's playground for under 7s. If we believe that families are a good demographic to engage we should explore what facility we might offer for older children aged 7-11.



3. Improve the Gardens by 2022

The regular list of awards that the Gardens win is ample proof of the skill of our gardeners and the enthusiasm and commitment of our volunteers and part of the charm of the estate comes from the informal woodlands. Our core principles will underpin the development of a strategic plan for our garden to; *conserve our historic, horticultural and natural heritage, sustain and improve our biodiversity and support our local community's health and wellbeing.*

Dog walkers, who will remain a core group of regular visitors, value the areas where dogs can be walked off a lead.

Our standards for the estate should remain high. This is part of our core purpose set out in our original objectives. We assume this means an increase in our paid gardening capability over time, augmented by an even larger group of volunteers.. Appendix I provides for a targeted increase to seven gardeners plus the current contracted talent from Gavin Jones and an increase by one post of our volunteer support capability.

Our Garden Plan, when agreed, will clarify our ambitions for the component parts of the Gardens, showing priority areas for new planting and improvement.



4. *Chiswick House awakes* by 2023

We must re-present the House. A EHT working party in October 2013 had a plan for this costed at £150,000 but after consideration within EHT it appears the return on this investment was not demonstrable. We think we need to re-visit this bid and update it and then utilise the current S106 monies amounting to c £100,000, re-bid to EHT and seek private support and support from the Friends. In finalising a new plan we propose to explore where the paypoint should be to maximise the visitors to the House and income.

5. A Design Festival by 2024

If we adopt Design as a USP for the estate then we should plan for a Design festival at a future date. This might showcase young designers. We could partner with a number of national design events e.g. London Design Festival where the V & A is the hub, which happens every September.

See background information here
https://en.m.wikipedia.org/wiki/London_Design_Festival



6. *Renewing the Conservatory* by 2032

Although the building is Grade I listed, the current structure only dates from the 1930s and is possibly the 3rd version of the building on the site. As a mainly wooden structure the building would not have been expected to have a permanent life and the repairs ten years ago and in winter 2019 suggest the current design is high maintenance and flawed.

Within the next two years the Trust should start to explore how the current structure might be totally renewed, probably with steel and glass, modern heating and ventilation and incorporating re-purposed space to the rear.

It is vital we maintain the current collection of camellias but in future the new building might also be home to other plant species providing year round interest. As a first step we should seek funding from a suitable garden charity to fund an options study.



AND SIX TRANSFORMED REVENUE ELEMENTS

I. Expand our supporters

All charities seek to create a large group of regular supporters, to provide regular income. Chiswick House has its Friends which were first set up in 1984, well before the Trust itself. The Friends have donated many thousands of pounds over the past 35 years and continue strongly today. They have raised most of their funds from events; for many years a Garden Opera and for the past 15 years a very successful annual Dog Show. We are extremely grateful to all the Friends and other volunteers who make these events happen. These events are volunteer run but do impose some burdens and opportunity costs on the Trust.

To date the Friends have not contributed regular unrestricted income to the Trust; rather they have either part funded or wholly funded improvements to the Gardens, or supported events such as the Camelia Festival. It will be desirable to encourage the Friends to commit to a regular annual support payment. Annual membership of the Friends is a modest £15.



The Trust has also started a Patrons' scheme, with a donation of £500, or couples at £750pa. Sales have grown slowly but the current members are loyal and appreciate the events programme.

This structure of individual supporters deserves to be reviewed.

Subject to further design and perhaps market-testing an intermediate level of "Supporters" might be introduced with a donation point of perhaps £50 per head/household. Clearly we must be mindful of the membership level for EHT members which is £60 for a non concession adult and which serves as a season ticket for entry into the House. Our offer would need to be differentiated and might include a discount of 10% of catering and retail and invitations to one music event each year.

As well as *Patrons*, I believe there is space for a Founders' Scheme which is designed to be attractive to those who are enthusiastic about our plans for a new Pavilion.

The full engagement list then looks like:

- Followers via email, Instagram, Facebook and Twitter
- Friends
- Supporters
- Patrons
- Founders



2. Improved revenue from catering

The new supplier will have ambitions to improve the catering offer and if their projections hold this should improve the revenue contribution from the single cafe from c£114k pa to £197K pa by 2024/5. An increase at current prices of £83k.

In addition we should encourage the provider to look at other options including but not limited to;

- Looking at the disused toilets adjacent to the cricket pitch to be opened up as a coffee/snack facility
- Looking at a roving ice cream/cold drinks offer during the summer period
- Looking at targeted evening service
- Looking at a “cream tea” offer in the Kitchen Garden

Separately the Trust has tendered and contracted an Events Caterer, to support corporate hires and weddings. This should increase contribution also perhaps by between £40k pa and £100k pa depending on the increase in the number of events, principally weddings, which could increase from 30-45.

FOODSHOW
* SPECTACULAR FOOD * INSPIRED EVENTS *



3. Improved return from events and the House

This strategy does not rely on a large increase in admissions income from the House anytime in the next five years. The 50% of visitors who visit for free as EHT members will always have an impact.

However as we realise a new Pavilion from say 2028, a significant increase in visitors makes more sense.

Our commercial events programme is nearly mature in that the Summer availability is nearly all committed, if 2019 events return. This will be completed by the addition of some targeted ‘public programming’ which expresses our charitable objectives.

Our wedding business is also busy although the ability to offer weddings on a Sunday offers more booking slots. In 2019, we were the venue for 29 weddings, our highest number ever. This could theoretically increase to 45 if Sunday slots were sold and if planning permission for the marquee could be extended for more than the seven months currently allowed.

However in strategic terms we need to understand that selling the opportunity to have a ceremony in the House on either a Friday, Saturday or Sunday competes with our ambition to encourage more visitors.

Our events programme also has consequences for visitor access to the House, both during event days when the House might be inside the event pay line or during set up and break down periods when health and safety risks arise.

Alongside this Strategy, trustees will commit to a minimum number of days that the House is open to visitors.

As commercial events mature and consolidate their market the event organisers will maximise their revenues and the Trust should seek to get a bigger return on our contribution. This may involve some greater risk but a flat fee for the space hire plus a percentage of sales is a model that works elsewhere.

Overall we should expect to raise our contribution from commercial events and hires by say 5% of the next five years.

We will need to stay willing to talk to others who would use the estate for their business offer. Our arrangements with the Little Forest Folk work well. Our partnership with La Trompette restaurant is great. There may be opportunities for sports coaching for children, or outside yoga and fitness classes for adults.

The Ionic Temple is a natural bowl and would be a lovely venue for gentle picnic music.



4. Improved revenue from assets; but more costs from asset management

Currently the Trust has:

- Two tenanted properties
- A cricket pitch and pavilion for hire
- A half share in the proceeds from a car park
- A café
- Backsheds, a let lock up Barn and several other outbuildings

We need to ensure we are getting a fair return from these assets and they are managed in a way that protects future income. We need to explore more imaginative uses that serve our and our local community needs. We need to put a plan together for our assets.

We should also explore whether the Council wishes to transfer any other assets into Trust control and whether there are any other opportunities for other uses from the underused buildings which could complement Trust income, without interfering with our mission and charitable objectives.

Alongside asset utilisation the Trust will need to be mindful of maintenance demands for its assets particularly the heritage assets. We need to establish a condition survey for key assets and a regular revenue contribution for periodic maintenance.

If we get a significant increase in coach visitors we will need to look at coach parking arrangements.

In our asset discussions we will need to be mindful of our designation as a Conservation Area with land designated as Metropolitan Open Land.

In strategic terms we might try to align returns from assets against maintenance requirements.

We have continuous responsibilities for site security, everyday repairs and water management as well as our stewardship of 2300 trees.



5. Headline sponsors

If Design becomes our defining characteristic, building on the assertion of Lord Burlington as a pioneer of both architecture and garden design, we should explore how carefully targeted commercial companies might be invited to become key sponsors. Our package of benefits might include entertainment opportunities, volunteer team-building sessions, discreet advertising and the opportunity to display products at events.

We should also encourage companies that might wish to:

- allow their staff to assist in estate activities
- provide grants for project funding
- assist in IT improvements.

A contribution from say 3 such long term sponsors is included in appendix 2.

6. Improved project fundraising

We need to raise our game in specific project fundraising. We need to recognise it is difficult to get voluntary funds in to pay for general expenses. This is why a good structure of engagement options as in (I) above is vital.

However many other charities find it possible to raise money for specific projects, particularly visible projects.

Through time we need a short list of appropriate projects that need funding, refreshed every year.



AND WHEN WE ARE SUCCESSFUL

A good strategy defines success. And a successful organisation recognises success is never complete. We strive to get better each year.

There are three sets of key indicators of success:

- the opinions and engagement of our target audiences and regular visitors
- the considered views of our landlords, EHT and LBH
- the considered opinions of our staff and volunteers

We need, by the end of 2021, to devise simple measures for testing these opinions and ways of ensuring these opinions are responded to.

But the Trust will also want to set its own definitions of success and here are six. We want to have:

1. The right size of staff group, with our staff paid top quartile for comparable jobs.
2. Evidence of a satisfactory annual maintenance programme.
3. A well funded public programme budget to support free events and to encourage new visitors to the House and Gardens. Evidence that our estate visitors are from diverse backgrounds and not just from local postcodes.
4. Budget provision for renewals, so we can plan ahead for tomorrow's needs
5. Happy funders; great partnerships with others; the approval of our allies and peers
6. Evidence of good, responsive governance.

List of development action points for the next 24 months

1. Consult on this Strategy
2. Replace the events Marquee
3. Consult and design our Kids Outdoor Play developments
4. Agree a plan and improve the House (physical access and interpretation)
5. Publish a Garden Plan
6. Audit our property assets and identify short term and medium term partnerships and income opportunities
7. Design and consult on a new framework for individual support
8. Bed down our new catering contractors; examine other catering points
9. Set up a Development Committee
10. Agree means of testing audience and stakeholder opinion
11. Start a public programme of events
12. Work towards the target operating model as income growth allows
13. Develop an audience development, visitor engagement and marketing plan
14. Examine siting and massing options for a new Pavilion
15. Look at options for a rejuvenated conservatory

Chair and Director
Revised draft 8
May 2020

APPENDIX I – DRAFT TARGET OPERATING BUDGET

All figures compared to 2020/21 original expenditure budget

	20/21	Target	Notes
Gardens	282	420	Adds 3 more gardeners
House operations	232	330	Adds two more staff
Non House Operations	113		
Public Programme subsidy	12	132	
Commercial costs	335	375	More seasonal cover
Fundraising	37	130	Adds one post and some budget
Marketing	24	130	
Support costs	281	448	Adds 1.5 admin; 0.5 PR; 1 extra vol manager; 1 education lead
Additional maintenance		150	
Retail overheads		100	
Strategic Development	0	100	
Totals	1316	2185	
Desired growth		999	

APPENDIX 2 – TARGET REVENUE UPLIFT AREAS

Model 1 Target revenue uplift areas – building on current model

	£000s
Catering	
Including one new catering point and pop up ice creams	150
Car parking/rents +5%	10
New asset utilisation (advertising /etc)	50
House visitation (to 12,000)	30
Increased margins from events	20
More weddings	40
Income from Friends and new Enthusiasts	30
Sponsorships x3/4	100
Total	430

Model 2

With new Pavilion, available for hire; attractive to visitors, temporary exhibition space, leading to further House visitation, catering spend and retail income	600
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