



# THE CHELTENHAM TRUST

## Strategic Plan 2016 to 2019



Find out more about  
The Cheltenham Trust's  
commitment to the people  
of Cheltenham and beyond



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## Welcome from the Chair and Chief Executive

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**Julie Finch**  
(CEO)

We are proud to be Chair and Chief Executive of The Cheltenham Trust; a registered charity and social enterprise operating five cultural and sports venues and managing and developing other assets for Cheltenham.

Since 'going live' on 1 October 2014, the Trust has enjoyed successes, with many more to come.

We have:

- Successfully taken over the management of the assets and venues
- Successfully shaped the move from Local Authority management to a new Charity model under the governance of a Board of Trustees
- Developed our brand, vision, mission and values for the Trust
- Developed a new model - based on Social, Cultural and Economic value creation, to align our resources, activities and outcomes
- Provided a high profile programme for culture and sport
- Secured £2.4m for the development of the Town Hall project
- Realised more than £700k in grant funding which would not have been available under local authority management
- Underpinned the public programme at The Wilson to create a high quality offer in the new gallery spaces
- Improved the quality of customer service more consistently across the Trust

- Unified our 5 venues under a One Trust ethos
- Met our objectives and exceeded targets
- Delivered over 450,000 tourism contacts through the Tourist Information Centre in 2015/16
- Worked with national organisations, such as the National Portrait Gallery, also - Arts Council Collection, to deliver the highest quality offer to the public
- Remained committed to access, equalities and volunteering. With regular volunteers helping the public enjoy iconic Cheltenham venues

We are pleased that the Trust's first chair, Jo Stringer has agreed to become its first President of the Trust. Although Jo decided to retire from the chair this new role will enable us to continue to access her expertise and enthusiasm for the Trust.

We know that the coming years will be demanding of our trustees, staff and volunteers, but our One Trust approach will enable us to ensure that our customers and audiences benefit from the best that the Trust has to offer in defining a resilient and rewarding future for the people of the town and visitors to the region.

**Peter Harkness (Chair) and Julie Finch (CEO) Jan 2017**

# 1.0. Introduction to the Strategic Plan



We create great experiences for the people of Cheltenham, regional visitors and tourists

This document sets out the key priorities for The Cheltenham Trust over the next three years, 2016-2019.

The strategy employed by the Trust is based on:

- The needs of the people of Cheltenham and visitors to the town
- Further transforming, developing and sustaining the Town's cultural and sporting offer and assets
- Creating memorable and exciting experiences for the public
- Ensuring that the Trust makes a vital difference to the cultural and sporting economy and is sustainable
- Promoting what is on offer to the world

The document outlines the initiatives and operational activities that the Trust will undertake to achieve our vision. The Core Strategy - Enhance Our Offer, Attract More People, and Generate More Income - will underpin all that we do. Our customers and audiences will be centre stage in our

decision making; we will be much more externally focused and visible to the world. Our Policy Framework and our Strategic Framework will ensure that the activity of the Trust is focused and will deliver against our new Performance Framework.

The Strategic Plan will be refreshed and updated every year in line with changes in the Trust's and town's priorities. Any emerging external factors which impact on the delivery of our overall goals and objectives will be considered and the strategy adjusted appropriately.

Whilst primarily addressing the needs of Cheltenham, the Trust also looks to Gloucestershire and more broadly across the UK and internationally to develop its business.

Regular reporting on our Strategic Plan, Business Plan and Activity Plans will be made to the Board of Trustees. The Trust is contracted by Cheltenham Borough Council to deliver particular outcomes; these will be reported in line with the Service Level Agreement.

## 1.1. About The Cheltenham Trust

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The Cheltenham Trust, an independent charitable trust, was formed in October 2014 with a mandate to manage the venues owned by Cheltenham Borough Council and to develop the cultural, sporting and tourism offer of Cheltenham. The five venues that we manage include a network of cultural and sports venues, some of the most prestigious buildings in the town:

- Pittville Pump Room (Grade I Listed)
- Cheltenham Town Hall (Grade II Listed)
- The Wilson (Refurbished 2013)
- Prince of Wales Stadium
- Leisure at Cheltenham

The Trust also:

- Delivers public programmes across and beyond the town (including bandstands) and in the heritage phone boxes on the Promenade
- Is keen to explore opportunities to extend its portfolio

We are responsible for leading on the strategies for:

- Culture (arts, heritage, performance)
- Sport (fitness, health and wellbeing, active participation)
- Lifelong learning (formal and informal education)
- Community Engagement (equalities, volunteering and local communities)
- Tourism Information and Marketing

We are also a major contributor to strategies for:

- Tourism
- Economy
- Education
- Social cohesion and community development
- Volunteering

Our remit is unique; we take a leading role in developing Cheltenham's national profile and enhancing the visitor experience in our own venues and across the town combining culture and sport. Whilst attracting local and national audiences to Cheltenham, we are developing the tradition of local use by local people. We create great experiences for the people of Cheltenham, regional visitors and tourists and actively promote Cheltenham to the world.



## 2.0 About Our Charity

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The Cheltenham Trust is a business that trades for the benefit of the public, as a charity, our Memorandum of Association, agreed with the Charity Commission, sets out the reasons why we operate as a charity:

- As a charity we create surpluses, not profit so that we can reinvest in order to develop the venues and create activity for the benefit of the public
- The money that the Trust generates and the management fee that the council pays us is solely directed at improving and developing the public offer. There are no shareholders or investors, our Board are unremunerated volunteers, and we are here for the benefit of the public
- We do not pay business rates or taxation on surpluses

- We adhere to the Charity Commission's good governance framework in order to operate appropriately
- The Trust can seek the best competitive commercial outcomes in order to sustain its activity for public benefit
- As a local enterprise, we attract local Trustees, our Trustees are unremunerated volunteers bringing a wide range of skills and expertise to shape the strategy of the Trust, their skills are essential to the effectiveness of the Trust
- Acting charitably, creating good value for money for our funders and customers

Enjoys support from

**200**  
volunteers

EMPLOYS

**144**  
STAFF  
making it  
an important  
employer in  
the town

HAD OVER

**930,000**

CUSTOMER ACTIVITY CONTACTS IN 2015/16

Has a turnover of  
**£5 million** (2015/16)

SUPPORTED  
**OVER 450,000**  
TOURISTS VISITING THE TOWN OR ACCESSING  
THE TOURIST INFORMATION SERVICE

## 2.1 Why Are We Here?

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Our vision and mission set out the remit for the Trust as follows:

### 2.1.1 Vision:

To create a Cheltenham that 'enriches' the lives of its residents and visitors through a vibrant cultural economy and a distinctive sense of place.

### 2.1.2 Mission:

To develop a new urban framework that generates social, economic and cultural value through embracing diversity, encouraging collaboration and driving creativity.

### 2.1.3 Our Values:

**ENTERPRISING SPIRIT** - we are ambitious and understand that smart commercial thinking is central to success. We'll be enterprising in the

way we work, interact and deliver our services.

**INDEPENDENT THOUGHT** - We bring people together, both internally and externally. The organisation thrives on diversity and a breadth of cross community collaboration.

**PROFESSIONAL PRESENCE** - we seek to connect at a deeper level, creating meaningful, memorable impressions that enrich lives at both an individual and community level.

**INCLUSIVE EXPERIENCE** - we're passionate about being the best that we can be. Our experience, infrastructure, independence and expertise ensures a forward thinking, first-class approach



## 2.2 The Cheltenham Trust's Civic Role

The role of the Trust as a civic leader is significant within Cheltenham. The development of venues managed by the Trust and the events held across the town will signify the Trust's ambition for growth, recognition and public engagement.

### 2.2.1 Cheltenham - A great place to live, work and visit

- **The Cheltenham Trust** leads a key strand of the development of the town; the role of the Trust in developing the significant heritage, cultural and sporting assets across the town is a strategic priority

- **The Cheltenham Trust** makes the best use of the assets and heritage across Cheltenham working in partnership with others

- **The Cheltenham Trust** makes a significant contribution to the town's tourism economy and to the quality of life in Cheltenham which attracts inward investment

- **The Cheltenham Trust** contributes to the reduction in inequality, improved health and wellbeing, learning opportunities

The Cheltenham Trust makes a significant contribution to the town's tourism economy



## 3.0 Strategic Context

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### 3.1 External Environment

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For the Trust to prosper and create surpluses for reinvestment, it must build its relationship with the public and encourage spend by the public. The Cheltenham Trust recognises that it has been established at a time of rapid change and challenge that has been influenced by:

- A recovering economy
- Further reductions in public funding and changes through devolution
- Increasing competition from new entrants in the market place
- Rising customer expectations
- Increase in ill health and poverty related to unemployment
- Skills deprivation and unemployment

### 3.2 Internal Environment

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The Trust is committed through its breadth and potential reach to contribute to the development of Cheltenham by:

- Enabling access to opportunities promoting activity and better quality of life
- Creating broad and mixed use of the assets managed by the Trust
- Promoting and developing the cultural economy supporting growth agendas
- Supporting the visitor economy through the tourist information centre and through highly visible cultural programmes



## 3.3 Core Strategy - Enhance Our Offer, Attract More People, and Generate More Income

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The Trust will now look forward and outwards to its customers and stakeholders, the core strategy is to increase footfall to create income. This can only be achieved through developing the quality of the offer that the Trust provides for its customers and audiences.

### 3.3.1 Income

Effective income generation is central to our strategy; we will grow income through baseline activity; new activity and fundraising activity. Our income will increase at a greater rate than our expenditure.

### 3.3.2 Expenditure

Controlling expenditure through efficiencies is essential. This means that we will ensure that value for money is achieved in all areas of expenditure including that expended on staff resources. The Trust will work with the Council to reduce carbon emissions and find more cost effective ways to reduce property costs in the longer term.

## 3.4 Core Strategy Framework

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In order to increase footfall to create income, we must focus genuinely and with commitment in three areas 2016-19 to meet our core strategy and goals to achieve it.

The Cheltenham Trust's core strategy is to engage in lasting relationships with its audiences and customers to increase footfall and use. This approach will drive greater income and help create a sustainable business which will underpin the charitable objectives of the Trust. In order to do this, the Trust must:

### 3.4.1 Develop the Capabilities

The way in which we continue to develop the Trust impacts on our people, which include our trustees, staff, volunteers, stakeholders, partners and customers. We will develop our capabilities through:

- Alignment of Trust policies with the strategic context of the Trust and our three areas of development: economic, social and cultural
- Alignment of skills, knowledge, funding, products and outcomes with customer needs

- Alignment of the performance framework with policy, resources and products

### 3.4.2 Grow revenue and capital

The Trust's ability to support its charitable objectives is limited by its ability to develop new income streams and grow the business. To grow the Trust; we need to grow our income and this will be achieved through:

- Developing our venues and assets
- Developing our social and cultural products, and be market driven
- Creating the right product mix for our customers and audiences
- Developing unique sports and cultural offers
- Using digital mediums to communicate, promote and grow the business



### 3.4.3 Sustain the Trust

We must direct and control our costs and use our resources wisely to create a resilient and sustainable organisation, we will do this through:

- Ensuring the support services, contracts and systems are in place to enhance Trust activity seeking efficiencies
- Building our relationship with our audiences and customers to ensure repeat visits and use
- Creating business models that are market ready, enterprising and of the highest quality



## 4.0 Developing our Venues and Assets - One Trust - 2016/17 Asset Plan

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The Trust recognises its responsibility to operate and develop the unique assets that it manages across the town of Cheltenham. These assets are held within the ownership of Cheltenham Borough Council on behalf of the public. There is no lifecycle agreement attached to the venues although as part of the lease agreement, the Council provides a fund each year to deal with repairs and maintenance works.

The venues are all ripe for investment and reinvigoration, their optimal use is central to the success of the Trust and the revitalisation of each asset will be captured in a wider Asset Strategy; this will consider the unique and bespoke customer experiences. Until the Asset Strategy is completed, this document acts as the guiding force to enliven and develop the assets.

### 4.1 Our vision for Cheltenham Town Hall

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The first phase of redevelopment for Cheltenham Town Hall is focusing on an options appraisal gathering the town's views on future use of the venue. At the heart of Cheltenham's community, it is envisaged that the revitalised venue will be a place where people go day and night. As the centre of gravity for local people and those visiting Cheltenham, the diversity of arts, entertainment and performance will attract many new

visitors. As a place to meet, dine and attend social and corporate events, people of all ages and backgrounds will be inspired by content and the programme and want to take part. The Trust will undertake a feasibility study, agree the preferred option and fundraise developing stage one of the project. We will create carnival moments to really enliven the spaces, bring back the art of magic, mayhem and fun for families.



## 4.2 Our vision for The Wilson Art Gallery and Museum



Cheltenham's premier art gallery and museum completed phase one of the redevelopment which has provided first class gallery spaces. Phase two redevelopment will enable high quality completion of the whole complex and greater use of spaces and galleries for the public and use of the collections. The stellar collections include the Arts and Crafts Movement collection and the growing collection from Edward Wilson's family in addition to fine and decorative art, world cultures, archaeology, costume and social history.

The completed venue will draw on collections and touring programmes and the creation of new content that chimes with the collections held by The Wilson. Their importance will be amplified through interpretation,

different art mediums, through digital content, engagement programmes, sharing of stories, partnerships and community identity. It will be a place that shares the story of Cheltenham and the surrounding area with the world, creating a strong sense of place, and it will bring the world to Cheltenham.

The Trust will shape phase 2 through addressing storage issues, public utilisation of the museum spaces, scoping of options through consultation processes and obtaining funding for a feasibility study. Create a quick fix under 5s art discovery play area that links seamlessly to the café (either by a trail or physically) - Loan large art from three national institutions to create 'big art moments'.

## 4.3 Our vision for Pittville Pump Room

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Pittville Pump Room's unique heritage will become an important educational resource



This world class heritage venue is a hidden asset, not fully developed or recognised for its importance in the history of the town. As a new destination experience, this venue will appeal to all people as a memory maker, its unique sense of place and the exquisite experience of visiting the building will have a lasting effect. Whether it's classical music, school concerts, weddings, christenings or funerals, corporate celebrations or seminars; local experiences as part of the community calendar of events,

or just visiting to enjoy the history of the town, this iconic building will appeal to all. Pittville Pump Room's (PPR) unique heritage will become an important educational resource, a significant part of the area's tourism offer, and a place which local people consider theirs.

The Trust will bring PPR to life, build and demonstrate its unique narrative as central to Cheltenham through interpretation and marketing, maximise use during the year and use it as a backdrop for two major events.

## 4.4 Our vision for Leisure at Cheltenham (Sport and Play Hub)

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Leisure at Cheltenham is ripe for transformation. The level of activity that people participate in is more important than excelling at sport if we are to contribute to tackling health problems. Sport England recommends 150 minutes of activity per week as an absolute baseline. It can become a venue where it becomes easier to take part in 'activity' of many kinds. This will be a place where the dwell time is increased by the very fact that the choices for families, friends

and communities enable multiple opportunities to get active, socialise, participate and compete. This will be a place that will enable everyone to 'find their thing', to take part and love life.

The Trust will complete phase one of the Sport and Play Hub providing opportunities for people to increase their level of activity, create connections to the park, open up the welcome to the venue and make online booking simple.

## 4.5 Our vision for the Prince of Wales Stadium (Sports and Play Hub)

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The Stadium will become recognised as a destination that offers unique sport opportunities and activities for people of all ages. Whether competing in athletics, matches or against yourself, the stadium will be of a standard that inspires potential sporting heroes, enabling you to be the best that you can be. It will be a place that encourages the uninitiated, a place that creates aspiration, a place that changes lives. The stadium

will be a place of choice for teams, clubs, groups, communities; regional, national and international events.

The Trust will cost the development of a 3G pitch, clubhouse, seating, new athletics track and changing facilities - develop the strategy for fundraising and test model. Hold a major outdoor event to celebrate the potential future of the stadium.

## 4.6 Our vision for the Red Telephone Boxes

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The heritage phone boxes on The Promenade will become animated with content as part of the wider Trust offer.

The Trust's role beyond the walls of the culture and sports venues will inspire new content, whether digital, artistic or as a public statement will enliven areas of the town exciting audiences, creating participation and signposting the public to other activities across the town.

## 4.7 One Trust - Expect the Unexpected

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- All our venues will be enlivened with art throughout
- We will participate in key national events across the Trust that include such things as Black History Month, Fun Palaces, International Women's Day etc. The Calendar of events will enliven the venues and create links to communities, the concept of seasons will be developed

- We will mix it up - there will be music events in sports venues and band stands, health and wellbeing events in cultural venues. Expect the unexpected in unusual places, Cheltenham's compelling narrative will appear in all venues and unusual spaces and places

- The Trust will develop a hub and spoke concept for tourist information access and distribution

## 5.0 How Will We Measure Success - 2016 to 2019

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We know that we need to be accountable for our use of resources in achieving our core strategy. The overall targets will build year on year, in some areas we need to create new baselines; we need to ensure that the right resources are being expended

to create the right products and opportunities to grow the Trust for the right audiences at the right price.

Our success will be measured through:

### 5.1 Social Impact

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- Increase our footfall by 0.5m in 2019/20
- Increase the number of people who are taking part in activities year on year
- Increase the number of people taking part in volunteering, community engagement, learning, talent and skills development activities year on year

- Undertake Staff satisfaction surveys - establish a baseline and show improvement year on year
- Undertake Customer satisfaction surveys - establish as a baseline and show improvement year on year
- Enthuse volunteers and create multiple opportunities for volunteering fostering positive activity
- Increase the opportunities for social interaction and involvement through Trust activity

### 5.2 Cultural Impact

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- Complete the Town Hall project by 2021
- Complete Stage 1 of the Sport and Play Hub by 2017
- Complete Stage 2 of the Sport and play Hub by 2019

- Become a recognised provider of culture and sports; achieve National Portfolio Organisation status with Arts Council England by 2018 (cross Trust model)
- Set a new agenda for sports/health and wellbeing to offer greater breadth of activities for more people to choose from (cross Trust model)

### 5.3 Economic Impact

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- Deliver income and fundraising targets to achieve goals year on year
- Explore acquisitions as appropriate to the aims and objectives of the Trust year on year
- Deliver impact against communications and audience development strategy and meet footfall targets year on year

- Deliver a viable business model for tourist information provision for Cheltenham which has no cost to the Trust by 2017
- Professionalise all partnership agreements and collaborative relationships 2017

## 6.0 Board of Trustees

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Martin Horwood



David Shelmerdine



Judith Hodsdon



Jacqui Grange



Ian Renton



Duncan Smith



Colin Hay



Laura Brookes



Paul Owens



Karl Hobley



Jaki Meekings-Davis



