

Leaving no story untold

ANNUAL REPORT 2017



Shakespeare
birthplace trust

Welcome

In 2017 we helped millions of people to get up-close and personal with Shakespeare.

The Shakespeare Birthplace Trust has a unique remit, charged by Act of Parliament to preserve in perpetuity, for the benefit of the nation, the world's greatest Shakespeare heritage assets in Stratford-upon-Avon and to share them with the world. In 2017 we did so more than at any time this century.

Half the nation's primary schools joined our annual Shakespeare Week celebration. The success of Shakespeare Week led to an invitation to join the Museums & Schools programme administered by Arts Council England and funded by the Department for Education. In 2017 3,500 children in 40 schools in areas of high deprivation benefited from this new project, Sharing Shakespeare's Story.

We offer a pathway to Shakespeare for people of all ages and stages of interest, from pre-school to A-levels and PhD research. Attendance at our formal learning programmes in Stratford-upon-Avon grew by 16% to 19,388, while digital learning and outreach grew to 1.6m. 62,000 users tapped into our growing digital collections catalogue which now features more than 250,000 items from our collections.

People from 86 countries made more than 872,000 visits to the Shakespeare family homes and gardens. Shakespeare's New Place, in its first full year of operation following its £6.2m capital transformation project, attracted a record 142,000 visits, up by 40% on pre-project predictions.

New Place provided the extraordinary canvas and the creative spark for adventurous new programming, including Motionhouse's dance circus interpretation of *The Tempest*. 170 years after Shakespeare's Birthplace was saved for the nation we celebrated with a theatrical re-enactment of its purchase at public auction.

We look forward to boosting our creative programming and outreach activity with funding awarded by Arts Council England as we join the National Portfolio for the first time, starting in April 2018.

Following a thorough review, we formally adopted a new governance model appropriate to our needs as a charity that has a national and international remit in the 21st century.

In December we wished farewell to our Chief Executive Dr Diana Owen. We thank Diana for all she has achieved during 10 years with the Trust, and for the legacy of an engaged, strong and optimistic organisation. We are delighted to welcome Tim Cooke who joined as Chief Executive from March 2018. Tim brings a wealth of leadership experience of organisations which, like the Trust, have knowledge and content at their heart and which seek to engage with diverse audiences.

Thank you to the SBT's staff and volunteers and to everyone who has supported our charity in providing so many opportunities for people of all ages and backgrounds, around the globe, to enjoy Shakespeare's works, life and times.

Peter Kyle OBE, CCMI, Chairman



*“Wonderful use of space, movement, great so
New Place is now the n*

–
MOTIONHOUSE'S *THE TEMPEST*





A mischievous online auction spoof

and a dramatic street performance
marked 170 years of saving
Shakespeare's Birthplace for
the nation.

“...space, wonderful
...andscape.
...new space.”



Artist-in-residence, *Carrie Reichardt*

celebrates through bespoke
ceramics **Ged, George
and all our volunteers**
who bring personality to our
visitor experience.

Half the nation's primary schools

Joined **Shakespeare Week**
across the UK.





Dramatic street performances wowed the crowds

with the story of how Shakespeare's Birthplace was saved for the nation – and from the clutches of showman P T Barnum – at public auction. The story was also the subject of a new exhibition marking 170 years since the Birthplace went 'under the hammer', the event that prompted the foundation of Shakespeare Birthplace Trust.



From corsets and codpieces to Bhangra dancing and book-binding, our innovative series of After Hours talks and workshops created fresh ways to get up-close and personal with Shakespeare.



The Method in the Madness of Tudor medicine was unveiled in a fascinating exhibition at Hall's Croft, exploring how discoveries then have influenced medicine today.

A summer of Make-a-Scene

stage-set craft activities and performance at all the houses was inspired by world cultures ranging from Japanese Shinto to Russian folklore.

Mary Arden's Farm *won accreditation*

from the Rare Breeds Survival Trust for its work to conserve unusual native breeds including the Arapawa goat.



At home with Shakespeare

Welcoming nearly 1 million people a year from at least 86 nations, our people, places and programmes invite everyone to feel at home with Shakespeare.

In 2017 872,000 visitors enjoyed the rich tapestry of Shakespeare's works, life and times, brought to life in different ways at each of the five Shakespeare family homes and gardens.

Our new Full Story ticketing structure reinforces the variety of experiences on offer. The new Explorer Pass and family package schemes, developed in partnership with attractions across Shakespeare's England offer visitors exceptional value for money.

'Crossing Borders' proved a fertile theme for imaginative programming, including our Shakespeare and South Asia exhibition and our 64th Poetry Festival which addressed contemporary issues of conflict, immigration and integration.

In our shops and cafes we aim to continue to give an excellent experience offering fresh new retail ranges that are inspired by items in our archives and menus that reflect local and seasonal food. We are very proud to be the only visitor attraction in the UK to hold the Gold Soil Association 'Food for Life Served Here' Award.

Anne Hathaway's Cottage was re-presented with *more historic furniture and objects*

from our collections, immersing visitors in the 500-year history of the family home of Shakespeare's future wife. The meticulous repairs to the chimney stack offered a chance to see how we conserve the historic buildings in our care.



Pathways to Shakespeare

From primary school pupils to PhD students, leisure learners to academic and teaching professionals, we offer Pathways to Shakespeare for people at every age and stage of interest. Here we highlight just some of the ways we inspired millions of people to engage with Shakespeare in the classroom and beyond.

Shakespeare rocked as 1.5 million primary school pupils took part in Shakespeare Week. Our Big Assembly was broadcast from London by Classic FM Facebook Live, complete with a catchy new song from MusicLine Direct. With Julian Lloyd Webber as a new patron, a composition project with Birmingham Conservatoire and Associated Board of the Royal Schools of Music led to a celebration concert of original Shakespeare-inspired music performed by 200 children.

Delivered in partnership with some of Britain's best-loved cultural institutions and more than 1,000 libraries, Shakespeare Week has to date given 5 million children a great first encounter with the world's best known writer. More than half of teachers taking part say it has introduced new ways for pupils to explore creativity; 37% had never taught Shakespeare before.

Our new Sharing Shakespeare's Story project empowered children to achieve more than they ever thought possible, taking on responsibility for guiding at the Shakespeare family homes and sharing their new-found knowledge and skills not just with their classmates but with visitors from all over the world. This project was part of our first Museums and Schools programme, funded by the Department for Education through Arts Council England.

It has benefited 3,500 pupils in 40 schools in areas of high economic and cultural deprivation in North Warwickshire and Birmingham. Teachers reported a lasting impact on children's performance across the curriculum, with improvements in self-confidence and awareness, co-operative working and language and presentation skills - and, of course, knowledge and appreciation of Shakespeare and history.

More than 19,000 people attended our formal learning courses in Stratford, with teacher and student satisfaction consistently rated at or above 95%. In addition to school and student groups - including many on study abroad programmes - we welcomed alumni and special interest groups, teachers on Continuing Professional Development courses and holiday makers keen to learn and be with others who share their passion.



“Inspirational, more exciting. The course marks you and stays with you leave.”





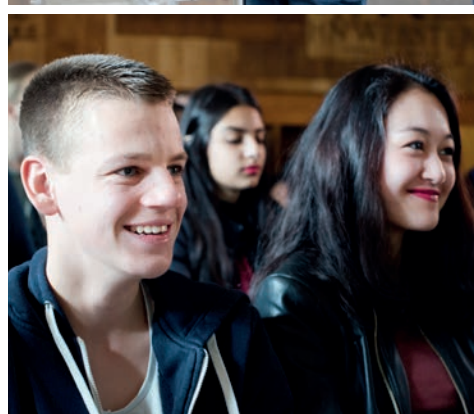
3,500 pupils attended
our first Museums and
Schools programme.

tivational and so
offered by the SBT
with you after



*“Shakespeare
Week has had
a **profound**
impact on our
entire school
community.”*

—
YEAR 3 CLASS TEACHER
SIR JOHN SHERBROOKE
JUNIOR SCHOOL, NOTTINGHAM





The title deed to Shakespeare's *New Place*

is one of only **90 documents**
listed on **UNESCO'S**

international memory of the
world register. A bronze Armada
chest at **New Place** brings to life
the story of the purchase of the site.

“Your course showed them that *Shakespeare*
is not an island, but a *world and one*
they belong to.”

—
ROBINSON COMMUNITY LEARNING CENTRE, INDIANA



Writer-in-residence Debra Ann Byrd's *memoir*

and the one-woman
show ‘**Becoming Othello**’
drew on the Trust's collections.





Sharing Shakespeare with the world

We engaged 5 million people around the world – a record number this century – in the enjoyment and understanding of Shakespeare.

The immense significance to world culture of the 'Shakespeare Documents' – the key archival sources for William Shakespeare's biography – was recognised by the UNESCO International Memory of the World programme. We led the successful nomination in partnership with The National Archives (kew), Worcestershire Archives and Archaeology Service, the College of Arms, the British Library and London Metropolitan Archives in the UK, and the Folger Shakespeare Library in Washington, DC. These documents now have equivalent status to the world's literary heritage as the pyramids to our built heritage.

With our popular Stratford-based courses booked to capacity, our ability to reach out to online users became more important than ever. Responding to their needs, we enhanced our website content and searchability. Our websites attracted a record 1.25 million users in 2017. Digital learning and outreach has trebled in the past three years to 1.6 million in 2017. 62,000 users tapped into our growing digital collections catalogue, which now features more than 250,000 items from our collections. Free online courses were delivered with partners and our expert lecturers developed live digital link-ups to classrooms around the world.

“An outstandingly deep, rich and varied source for the study and enjoyment of Shakespeare's life, works, literary context and the continuing evolution of theatre and performance.”

—
DESIGNATED COLLECTION, SBT
ARTS COUNCIL ENGLAND

Closer to home, 5,300 residents and workers in Stratford-upon-Avon took advantage of our free Community Pass to Shakespeare's New Place. Community partnerships involved an array of social and practical activity - with the Armed Forces, MENCAP, Brownies, Care Farming, and local craft and interest groups.

Welcome For All training for our teams was designed and delivered by volunteers. New Place has been formally recognised as a Dementia Friendly venue and has pioneered access programmes in collaboration with Age Friendly, MENCAP, Makaton, Widgit, Vocalise and Autism. All of these programmes are being rolled out across five of our properties.



Shakespeare Distillery's New Place Mulberry Gin

was produced with fruit from **two** of our historic **mulberry trees**.



Looking forward

We will continue to develop and share our unique heritage properties, collections and knowledge and to enrich people's experience of Shakespeare locally, nationally and internationally.

As an independent charity we depend on visitor admissions (and associated catering and retail sales) for the majority of our income. However, the passage of millions of visitors also takes its toll on the fabric of our historic homes and collections, and ticket sales alone cannot generate sufficient surplus to meet the unending challenge of conservation and interpretation. In 2018 we will undertake further research, working with leading experts to inform conservation planning for the Shakespeare family homes and to ensure that we continue to enhance the experience we offer to growing numbers of visitors.

We will embark on ambitious new programmes with a focus on community engagement in the arts, culture and heritage. Fresh creative performances and interpretations of our collections, historic properties and learning programmes will give at least three million people the opportunity to enjoy Shakespeare's works, life and times on his home turf or online and to build Stratford-upon-Avon's global renown as a cultural centre of excellence. We will develop our award-winning, free-to-access Shakespeare Week programme that is transforming the teaching reception of Shakespeare in schools, by 2022 aiming to reach 8 million young people. We aim also to transform our offer to targeted groups in areas with low levels of cultural engagement.

“We're boosting our creative programming and outreach activity with funding awarded by Arts Council England.”

With a Museums & Schools grant of £46,000 funded by the Department for Education we will also continue our Sharing Shakespeare's Story programme with a further 3,500 children in 40 schools in areas of high deprivation.

We believe that Shakespeare is for everyone so we will continue to remove barriers to access for people with physical and mental disabilities. In 2018 a DCMS grant of £24k will enable a project with VocalEyes to develop audio-described content and train 24 staff and volunteers in visual awareness. We will also join with Warwick and Stratford District Councils and other partners in the region to survey our sites for the online accessibility checker, disabledgo.com.

Our new Board, working with a newly formed Council, will review our strategy to ensure that we have the capacity, capability and resources to deliver our charitable objectives for the benefit of future generations. We have many calls on limited resources: developing partnerships and a strong supporter base will be key to our success.





Fresh interpretation
will give *3 million people*

the chance to enjoy Shakespeare
on his home turf and online.

We aim to reach
8 million young people
in schools by 2022.



*Conservation of the
historic houses and
collections is an
on-going challenge.*



Our people

Trustees from 1 January - 31 August 2017

Chairman

Peter Kyle OBE, Hon DArts, CCMI

Life Trustees

Sir Eric Anderson

KT, MA, MLitt, Hon DLitt, FRSE

Sir Geoffrey Cass

MA, CCMI, FlntD

Richard Hyde BSc, FCA

Helen Keays BA, MCIM

Professor Kate McLuskie

MA, PhD

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Roger Pringle MA, DUniv, FRSA, DL

Neville Tarratt FCIB

Professor Sir Stanley Wells CBE,

BA, PhD, FRSL, Hon DLitt, Hon DPhil

Michael Wood MA, HonDPhil,

FRHistSoc, FSA, FRSA

Ex-officio Trustees

Tim Cox Lord Lieutenant of

Warwickshire

The Marquess of Hertford DL,

ARAGS High Steward of Stratford-upon-Avon

Councillor Juliet Short

Town Mayor of Stratford-upon-Avon
(to 17 May 2017)

The Rt Revd Dr Christopher

Cocksworth BA, PhD, PGCE Bishop
of the Diocese of Coventry

The Revd Patrick Taylor

MEng, BA, MA, Vicar of the
Collegiate Church of Holy Trinity

Bennet Carr BA, PGCE, NPQH

Headmaster of King Edward VI School

Local Trustees

Nick Abell

Ralph Bernard CBE

Ros Haigh

Peter Kyle OBE, CCMI

John Russell BSc

Representative Trustees

Caroline Brazier MA, British Library

Vacant, English Speaking Union

Margaret Cund BSc, MPhil

National Trust (from 4 Jan 2017 - Vacant)

Catherine Mallyon

Royal Shakespeare Company

Neil Constable FGSM, CCMI

Shakespeare's Globe

Professor Michael Dobson BA,

MA, DPhil University of Birmingham

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University of Cambridge

Professor René Weis BA, MA, PhD

University of London

Professor Carol Chillington Rutter

BA, MA, PhD University of Warwick

Penelope, Viscountess Cobham

CBE Visit England

Executive Committee

The oversight of the SBT
was vested in the Executive
Committee:

Peter Kyle Chairman

John Russell Deputy Chairman

Nick Abell

Ralph Bernard

Margaret Cund (to 4 Jan)

Professor Michael Dobson

Ros Haigh

Professor Carol Chillington Rutter

Leadership Team

Becky Cund

Director of HR & Administration

Delia Garratt

Director of Cultural Engagement
(maternity leave from 18 Apr 2017)

Diana Owen Chief Executive

(to 3 December 2017)

Heather Lees

Director of Finance & Planning

Paul Taylor

Acting Director of Cultural Engagement
(maternity cover from 18 Apr 2017)

Philippa Rawlinson

Director of Operations & Marketing

Trustees from 1 September 2017

Following the approval of a Charity Commission Scheme on 1 September 2017 The Charities (Shakespeare Birthplace Trust) Order 2017 came into effect bringing in a new Board of Trustees:



Peter Kyle
Chairman



John Russell
Vice Chairman



Nick Abell



Colin Bennett



Ralph Bernard



Penelope, Viscountess Cobham



Rebecca Dobbs



Kathy Gee



Ros Haigh



AJ Leon



Lena Cowen Orlin



Carol Chillington Rutter

Julia Howells
Secretary to Trustees

Financial year

Extract of the Shakespeare Birthplace Trust's income and expenditure for the year to 31 December 2017.

Our total unrestricted income from operations was £10.3m. Our net gain on investments gave an overall income of £10.6m.

Admissions to our historic houses raised £5.8m and sales in our shops and cafes generated £2.7m. Our learning activities contributed £790k and investment income was £890k. Our expenditure included the costs of maintaining and providing access to our historic places and collections, operating our retail and catering activities and providing award-winning learning programmes, including the national primary schools programme Shakespeare Week.

Overall we made an unrestricted operating surplus of £234k before the actuarial gain on the defined benefit pension scheme (£496k), the gain on investments (£316k) the triennial revaluation of the investment properties (£2.9m).

The Shakespeare Birthplace Trust maintains reserves to ensure that it is able to continue to fulfil its charitable purpose by providing for business continuity, the ongoing conservation needs of its heritage assets, and to support future capital and revenue expenditure requirements which may not be covered by incoming resources. Funds required for the long-term conservation of our houses and collections far exceed the reserves available.

A programme of capital improvements has been identified by Trustees including £5m for conservation work across a number of historic sites over the next ten years. This designated fund relates only to known conservation needs of the Trust's historic properties and does not include conservation or storage needs of the library, archive and collections. Other liabilities include the pension deficit (£2.6m). Trading income (£2.7m) is vulnerable to pressures from geo-political instability and currency fluctuations.

The Trustees have agreed that the appropriate target for the Trust's general, unrestricted reserves should be equivalent to six months' operating costs. Currently this figure equates to approximately £5m. Total free reserves as at December 2017 were £3m. The Trustees will seek to ensure that the Trust builds its unrestricted reserves to a sufficient level to meet this target over the next 3 - 5 years.

See our full accounts online at shakespeare.org.uk/about-us/annual-report

Income: £000

INCOMING RESOURCES
FROM CHARITABLE ACTIVITIES 6,598

TRADING INCOME 2,701

INVESTMENT INCOME 890

DONATIONS AND LEGACIES 23

OTHER INCOME 46

TOTAL INCOME 10,258

Expenditure: £000

CHARITABLE ACTIVITIES 6,929

RAISING FUNDS 3,095

TOTAL EXPENDITURE 10,024

NET OPERATING SURPLUS 234

GAINS ON INVESTMENTS 316

REVALUATION OF THE INVESTMENT
PROPERTIES 2,968

ACTUARIAL GAIN ON DEFINED
BENEFIT PENSION SCHEME 496

NET UNRESTRICTED SURPLUS 4,014

Thank you

We are very grateful to a wide range of individuals and organisations whose generous support in 2017 has helped to care for the Shakespeare houses and collections that inform and inspire millions of people every year. Thank you.

Trusts, Foundations, Grant Makers and Corporate Supporters

Arts Council England
DCMS/Wolfson Museum and Galleries Improvement Fund
Finnis Scott Foundation
Heritage Lottery Fund West Midlands
Museums and Schools programme (funded by Arts Council England and Department for Education)
Rosconn Group
Stratford Girls' Grammar School
The Space

Patrons and Individual Supporters

Lorraine Arnold
Claire Bendall
Natalie Bishop
Douglas Bridgewater
Peter Buckroyd
Emma Dain
Irving and Olya David
Andrew Day
Corinne Elliott
Amanda Gall
Iain and Zoe Gilbey
Ken and Jean Gray
Angela Hartrey
(in memory of Patrick Hartrey)
Maureen Hitchens
Richard Hyde
Helen Kemp
Annette Miller
Mark Newsam
Diana and Martin Owen
Irene Page
Conrad Prince CB
and Helen Prince
Carol Chillington Rutter
Yoshiro Sugimoto
Gillian Taylor
Michael Thrussell
Sir Stanley Wells CBE

Partners and Community Supporters

Arts Connect
Association of Senior Children's and Educational Librarians
Society of Chief Librarians
Walker Books
Woodland Trust

Legacies

Ann Lamb

Shakespeare's Birthplace America

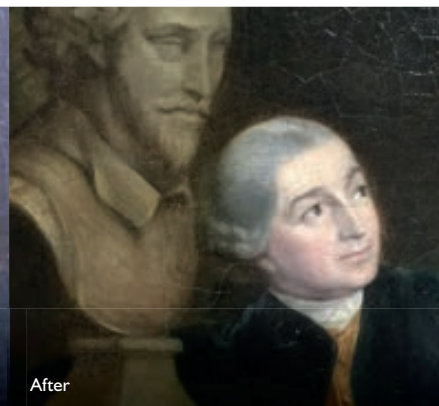
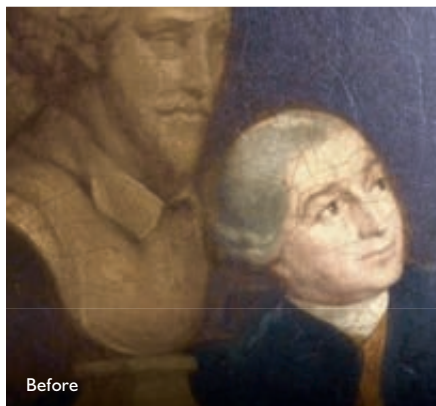
Shakespeare's Birthplace America is a nonprofit 501(c)(3) organization dedicated to helping Americans connect with Shakespeare's life, works and times and to preserving the Shakespeare properties in Stratford-upon-Avon.

We thank our generous supporters:

Michael Galvin
Charlie & Jane Goldman
Charles & Molly Thayer
(in honour of George L. Hacker)

Friends of the Shakespeare Birthplace Trust

Our warmest thanks also go to the Friends of the Shakespeare Birthplace Trust for their commitment and generosity and to all our donors including those who prefer to remain anonymous.



A generous grant from the DCMS/ Wolfson Museums and Galleries Improvement Fund

has helped make the homes more **accessible for people with visual impairments.**

Portrait of David Garrick was conserved thanks to a gift in memory of Patrick Hartrey



Over 4,000 young people enjoyed educational activities in the **Rosconn Learning Rooms** at Shakespeare's New Place



A very special thank you

In 2017 we welcomed 94 new volunteers, and total **volunteer hours increased by 11.2% from 21,403 to 24,107 hours.** Volunteers bring a wealth of skills and experience and play a crucial role in enabling the Trust to deliver its mission. We are grateful for their support.

The story doesn't have to end here.

We rely on supporters like you to help conserve the historic houses and objects in our care so more people from around the world can discover and be inspired by Shakespeare. Please join us as a Friend or make a donation today.

Find out more: shakespeare.org.uk/support-us



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**ARTS COUNCIL
ENGLAND**



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