

**External Audit of the Battle of  
Prestonpans (1745) Heritage  
Trust**

**Final Report**

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**DC Research**

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## 1. INTRODUCTION

### Objectives of the Study

- 1.1 The Battle of Prestonpans (1745) Heritage Trust commissioned DC Research to carry out an 'external audit' of the Trust in September 2018.
- 1.2 The main purpose of the External Audit (referred to as the 'review' throughout this report) was to:

*'critically examine the Trust's delivery since its foundation in 2006 of the objectives identified in its Mission Statement, and to consider the options open to it to take its work forward during the next ten years.'*
- 1.3 Given that the aim of this review is to '*critically examine the Trust's delivery...of the objectives identified in its Mission Statement*' it is useful to present the current objects of the Trust as set out in the Memorandum and Articles of Association.
- 1.4 Figure 1.1 below shows the current Objects of the Trust (taken from the Special 'Elucidating' Resolution agreed at a General Meeting of the Trust in January 2015):

### Figure 1.1: Extract from memorandum and articles of association of the Battle of Prestonpans (1745) Heritage Trust

**the following Special Resolution was agreed and passed by the Members that elucidates the Objects of the Trust: That Clause 3 shall read henceforth as follows:**

3. The Charity is established for the purpose of advocacy on behalf of the preservation of the site of the Battle which took place near to Prestonpans on September 21st 1745, the honouring of those who fell, and for the advancement of heritage research and education leading to greater understanding and proper remembrance of the Battle, including studies facilitating the interpretation of all matters leading up to and consequent upon the Battle and the social and environmental context in which it was fought, and in so doing making use of all manner of literary, artistic and other representation to enable the widest possible appreciation of the heritage to be discerned.

- 1.5 This review forms part of three overarching aspects of support work that are currently being carried out by DC Research:
  1. A comprehensive external audit/evaluation of the Trust's work over the last decade, and the plans for the future in relation to the Objects (see Figure 1.1 above) of the Trust.
  2. A mentoring role as the Trust evaluates other battle sites/heritage centres in the UK and abroad for best ideas.
  3. Mentoring as the Trust arrives at a consensus with national and local stakeholders on the way forward – supporting the development of the Draft, and then Agreed, National Manifesto for the Trust.

### Approach and Key Tasks

- 1.6 Much of the work for this review involved consultations and discussions with Trustees of the Battle of Prestonpans (1745) Heritage Trust (individually and collectively) as well as consultations with external stakeholders. These consultations were supported by a range of desk-based research tasks including analyses of the Trust's formal records since 2006.
- 1.7 In summary, the main tasks carried out for this study were as follows:
- **Inception and Taskforce Progress Meetings** – An inception meeting was held in August 2018 between Taskforce representatives from the Trust and DC Research. Ongoing progress was communicated by email during the study, with Taskforce progress meetings taking place in September and November 2018 and January 2019.
  - **Consultations with Trustees** – One-to-one, face-to-face consultations took place with Trustees during the review. In addition, Trustee group discussions about the review also took place – as part of the Inception Discussions and at each of the Taskforce Progress Meetings.
  - **Consultations with External Stakeholders** – A range of one-to-one, face-to-face consultations with key external partners (supported by additional consultations carried out by telephone discussions) took place during the review period.
  - **Event Attendance and Observations** – The study team attended the September 2018 East Lothian Battle Weekend events including the Battle of Prestonpans Re-enactments, holding informal 'participant observation' style discussions with re-enactors and visitors, as well as visiting the Prestonpans Tapestry exhibition in Cockenzie House.
  - **Group Discussion** with the '**Friends of the Tapestries**' – the study team carried out a group discussion at the November 2018 meeting of the Friends of the Tapestries.
  - **Desk Based Research** – To support the various aspects of primary research (i.e. one-to-one consultations and group discussions) a range of desk-based research tasks also took place. This included reviewing background documents, information and data relevant to the review.
- 1.8 A list of the individuals consulted on a one-to-one basis during this review is included in Annex 1 to this report.

### Structure of Report

- 1.9 **Section 2** of this report deals in turn with the **key achievements** of the Trust in pursuit of its Objects as well as giving consideration to the main **success factors** that have underpinned these achievements.
- 1.10 **Section 3** looks at the **future priorities** of the Trust – and considers it in two main aspects – firstly, focusing on the priorities around the intention to create a permanent venue/centre in Prestonpans for the activities of the Trust (most commonly referred to as a 'Living History Centre') and secondly looking at the other priorities and ambitions for the Trust going forward.

- 1.11 **Section 4** looks at the **challenges** for the Trust – including the current challenges the Trust is facing, as well as the challenges specific to the achievement of the 'Living History Centre'. It also includes some general reflections and **issues for the Trust to consider** going forward.

## 2. KEY ACHIEVEMENTS OF THE TRUST AND SUCCESS FACTORS

### Introduction to Section 2

2.1 This section presents the findings from the review in terms of both the **key achievements** of the Trust and also the **success factors** that have underpinned these achievements.

### Key Achievements of the Trust

2.2 Overall, consultees (both trustees and external stakeholders) reported on the notable contribution to, and advancement of, the Objects of the Trust that have been achieved over the last decade.

2.3 In particular, the main themes that emerged from the consultations related to:

- Increased **Profile** of the Battle
- Improved **Awareness** and **Understanding** of the Battle
- **Protection** and **Interpretation** of the Battlefield site

2.4 These achievements clearly align with the Objects of the Trust and a wide range of activities that have been carried out by the Trust were identified as having contributed to these achievements. The most commonly mentioned activities that supported these achievements include: the tapestries; the re-enactments; and advocacy and campaigning activities of the Trust. Prominent other activities identified through the desk research and discussions with the Taskforce include the various research and publications that the Trust has been involved in; the school visits and tours; and the range of theatre and other artistic activities.

### Battle Re-enactments and Events

- **There have been 10 re-enactments since 2007 led by the Trust's own Alan Breck Regiment of Prestonpans Volunteers.**
- **From modest initial cameos the re-enactments now achieve 2,500 visitors with 200+ re-enactors.**

2.5 A fundamental activity of the Trust has been around the re-enactments, celebrations and commemorations of the Battle of Prestonpans that have taken place over the last dozen or so years (since 2007).

2.6 The scale of activity around the re-enactments has grown each year since the Trust was established in 2006. Initially a discrete annual commemoration of the Battle of Prestonpans (2007 to 2015), it has now joined the Scottish Battlefields Trust's East Lothian Triennial Cycle taking rotation with Dunbar 1650 and Pinkie Cleugh 1547 to optimise activities across the county.

2.7 The most recent commemoration (a designated EventScotland National Event in September 2018) involved a Grand Commemorative Parade

through the town's Clan-eponymous streets before the (most extensive so far) encampment and Re-enactment Weekend, which took place on 15<sup>th</sup> and 16<sup>th</sup> September. It is estimated that around 2,500 people attended the events, showing the scale of **community and audience engagement that the re-enactments and associated events attract**. There is anecdotal evidence<sup>1</sup> that the re-enactments attract people to Prestonpans that would otherwise not visit the area – and as such, there is likely to be an economic contribution and impact on the town and the wider area of these activities.

- 2.8 The **re-enactments clearly contribute towards the Objects of the Trust** – most notably helping to develop a 'greater understanding' and 'proper remembrance of the Battle'. In addition, the 'honouring of those who fell' is an important aspect of the events, notably the Commemoration parade and ceremony.
- 2.9 The Trust also recently unveiled and dedicated two new **Memorial Tables**, one each to the Clans that Fought and the Hanoverian Regiments they defeated – this is a clear example of the Trust's activities around achieving their Objects about '*the honouring of those who fell*'. Clan Chiefs and their Representatives were present for this unveiling and latterly the Governor of Edinburgh Castle also visited.
- 2.10 The re-enactment events and activities help to raise the profile of the Battle, increase the understanding of the Battle amongst attendees at the events, and seek to engage the local community within Prestonpans through these activities to increase awareness and appreciation of the Battle. The events are well supported by the media and extensive PR initiatives which included coverage on BBC2 in 2018.
- 2.11 The fact that the Battle of Prestonpans Re-enactment Weekend forms part of the Triennial East Lothian Battle Weekend under the auspices of the Scottish Battlefields Trust (SBT) does mean that the Prestonpans Re-enactment activities are perceived by some external stakeholders as part of the SBT rather than the Battle of Prestonpans (1745) Heritage Trust. This issue is revisited in Section 4.
- 2.12 There are **various other strands of activities** of the Trust that have helped to increase awareness, and appreciation and understanding, of the role of the Battle. This includes the range of **education and learning activities** that have taken place since the inception of the Trust – which has involved activities delivered in education locations as well as tours of the battle site itself.
- 2.13 The Trust has also been involved in, and continue to be involved in, a wide range of **research activities and publications**. This includes research on the battle site itself – notably the archaeological examination of the site by

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<sup>1</sup> Note: it is anticipated that data from visitor surveys will be made available to the study team prior to the finalising of this report, and that this will provide evidence about the type of audience attracted, the scale of local community engagement achieved, etc. which will provide additional evidence about the role of the Re-enactments in attracting people to visit Prestonpans.

Dr Tony Pollard which led to the production of the Archaeological Statement. In addition, there have been a range of scholarly publications about the Battle<sup>2</sup> that have been published at various points as well as a number of novels based around the battle.

- 2.14 **The Trust has also used a range of artistic works and activities** such as theatre productions, the aforementioned novels, the late Andrew Hillhouse collection of paintings, as well as storytelling and battle-gaming activities to enhance the awareness, and appreciation and understanding of the battle.
- 2.15 Finally, the nationwide participation by the **Alan Breck Regiment of Prestonpans Volunteers** established by the Trust in 2007 has also contributed to the Objects of the Trust in relation to broadening the awareness of the battle, as well supporting the '*greater understanding and proper remembrance of the Battle*'.

### Tapestries

- **More than 200 embroiderers made over 10 million stitches taking more than 25,000 hours to create the Battle of Prestonpans Tapestry.**
- **The Scottish Diaspora Tapestry involved over 1,000 stitchers making 30 million stitches in 305 panels in 34 countries across the globe.**
- **Over 80 tapestry exhibitions have taken place, with the tapestries travelling more than 30,000 miles across the globe. The exhibitions last around one month on average, resulting in some 2,400 days of volunteer time supporting these exhibitions.**

- 2.16 A substantial amount of the activities of the Trust over the last decade has involved the '**Tapestries**' (i.e. The Prestonpans Tapestry and The Scottish Diaspora Tapestry). The creation, exhibiting, and associated events and activities around the Tapestries have made several important contributions to the achievements of the Trust. In particular, this has included the Tapestries being deployed:
- As a means of raising the profile of the battle (e.g. '*significantly raised the profile of the Battle*'; '*powerful tool for the story*')
  - As a way of reaching a national and an international 'audience' (e.g. '*reached across the globe*')
  - As a community arts project that engaged the local community (e.g. '*got local people engaged*')
- 2.17 This includes (for the Prestonpans Tapestry) helping **to increase the profile, raise awareness, and help to tell the story and interpret the Battle itself**. This increased profile and awareness has been achieved at various levels – including **locally** (within Prestonpans and East Lothian); **nationally** within Scotland and the rest of the UK (through the various tours and exhibitions of the Tapestry) as well as **internationally** (e.g. via

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<sup>2</sup> See Annex 2 for a list of the research, scholarly and other publications.

the exhibition in Bayeux in 2013 and other locations within France in 2012 and 2017). In addition, the production of various publications, DVDs and mobile phone applications associated with the Tapestry has helped to promote and raise the profile of the Tapestry and therefore the Battle itself.

- 2.18 Another important dimension of the Tapestries relates to the development and creation of the Tapestries themselves and the **social and community impacts** of this, most particularly **for the stitchers** themselves – both individual and collectively.
- 2.19 This includes the positive impact that being involved in the Tapestries had on the individual stitchers – with some stitchers reporting that it was *'huge'* and *'gave them a 'new lease of life'*. This includes **self-confidence, self-esteem** and (re)engaging with other people in their **community**. In addition, individual involvement also either **re-invigorated skills** that the individuals previously had, but had not used for some time, or helped to **develop new skills** for others involved.
- 2.20 At the community level, involvement in the Tapestries helped to foster, strengthen, and develop a (stronger) **sense of community** for those directly involved.
- 2.21 There have also been **skills development** (around stitching and crafts more broadly), learning, and education impacts from the Tapestries for those involved – something that the individuals involved are keen to see continue in the context of the Tapestries' eventual permanent home.
- 2.22 The desire for this to continue links to the sense of 'ownership', commitment and responsibility that exists from those involved in the stitching of the Tapestries (as well as their involvement in related activities such as the touring and exhibiting of the Tapestries).
- 2.23 Whilst there have been clear benefits from the activities around the Tapestries as set out above, for some consultees the scale of effort around the Tapestries was described as a *'distraction'* for the Trust from the wide range of activities it carries out in pursuit of its Objects. The issues around this are dealt with in Section 4 of this report.
- 2.24 Consultees also reflected on the wider **stimulus that the Tapestries have had on the growth in the use of tapestries** elsewhere in Scotland – particularly as a community art initiative. (Most notably, the inspiration of The Prestonpans Tapestry as the catalyst for the Great (History) Tapestry of Scotland and Mount Felix were highlighted by consultees).

### Advocacy and Campaigning

▪ **Campaigning days to protect the battlefield have involved well over 200 days since 2006.**

- 2.25 A key strand of the achievements of the Trust identified by consultees has been the **advocacy and campaigning activities** of the Trust – both specifically around protecting the Battle site in Prestonpans, as well as more generally campaigning and activity around national battlefield policy. The

Trust's Biennial National Battlefield Symposium was the catalyst in 2014 for the subsequent establishment of the SBT.

- 2.26 In terms of protecting the Battle site within Prestonpans, this is clearly within the Objects of the Trust which state that the Trust was established '*...for the purpose of advocacy on behalf of the preservation of the site of the Battle...*'
- 2.27 The Trust has been involved in a range of activities and campaigns to help protect the site of the Battle – including petitioning against potential developments on the site, as well as engaging with local community and national organisations and agencies (such as Historic Environment Scotland and National Trust for Scotland) to ensure that the Battle site is given appropriate protection and achieves profile to ensure it is recognised at a national level and is included in any national initiatives and campaigns.
- 2.28 External stakeholders also acknowledge the role that the Trust has played around influencing national battlefield policy and practices. Although it does appear that **for some external stakeholders there is a confusion** about the remit and activities of the Battle of Prestonpans (1745) Heritage Trust in this regard, and the remit and activities of the Scottish Battlefields Trust.

### Evidence and Quantifying Achievements

- 2.29 Based on the consultations and desk research carried out for this review, the achievements of the Trust are clear, and many of the activities and achievements have made clear and direct contributions to the Objects of the Trust.
- 2.30 One reflection on this is that the evidence around these achievements (and any advocacy about the achievements of the Trust) would be further enhanced by the consistent collection of data to enable the regular quantification/measurement and reporting of these achievements where possible. It is therefore recommended that headline statistics about a range of different measures of activity and achievement (taking the highlights included within the green boxes in this section of the report as examples) should be monitored and measured on an ongoing basis, and used for reporting the achievements and impacts of the Trust to a range of audiences<sup>3</sup>.

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<sup>3</sup> This would include capturing the following data across the activities of the Trust: Scale of re-enactments and other commemorative events; Number of visitors to re-enactments and other events; Number of volunteers involved in the Trust's activities (trustees, re-enactors, stitchers etc.); Number of hours of volunteer time provided (which can then be valued using recognised guidance); Number of school/learning and community initiatives and activities delivered; Range of research publications, APPs and theatrical events; Number of people attending school/learning and community activities and initiatives; Scale of exhibitions and Tours of the Tapestries and distances travelled; Number of visitors to the Tapestry exhibitions and tours.

### Success Factors Underpinning the Achievements

- **Volunteers participating at re-enactments since 2007 (pro bono) have contributed more than 3,750 days.**
- **Trustees have met over 100 times for 3 hours on each occasion since 2006 with pro bono facilities provided.**
- **Volunteers leading Tours, conducting school visits, battle gaming and attending meetings nationally have contributed around 1100 days.**
- **Grant applications to a wide range of funders (e.g. HLF, HES, Viridor, Scottish Government, Paths for All, East Lothian Council, VisitScotland, CreativeScotland and Education Scotland) have occupied over 300 days of volunteer time.**
- **The Trust has attracted more than £1 million since its inception – including £531,500 from a range of grants, as well donations in the region of £522,000.**

2.31 There are a range of success factors that underpin the achievements of the Trust that are set out in this section – and consultees highlighted what they consider to be the key factors that have supported these achievements.

2.32 First, the **substantial commitment of (a small cohort of) trustees** is recognised as the driving force behind many of the achievements of the Trust. The high levels of commitment from this small cohort of very active trustees is what has underpinned the scale of activity achieved and the resultant impacts. This is recognised by many consultees as a notable level and scale of achievements with what is effectively a very small, core team of dedicated and committed trustees operating on a voluntary basis.

2.33 Second, another factor that has helped the Trust to reach this scale of achievement is the **financial contributions that the Trust has been able to attract.**

2.34 In total, the Trust has **attracted more than £1 million** since its inception. This includes £531,500 from various grant applications, as well donations in the region of £522,000.

2.35 This scale of financial contribution has enabled the Trust to carry out the wide range of activities that have taken place over the last dozen or so years, and this success in attracting this level of grant and donation has underpinned what has been achieved.

2.36 This scale of achievement reflects both the competencies available amongst the trustees since 2006 to attract such funding and the demonstrable attractiveness of the Objects of the Trust.

2.37 Third, many consultees highlight that the Trust has been **driven by a strong personality throughout its lifetime**, and that this has helped to engage (and '*magnetise*') individuals to get involved with, and support, the activities of the Trust. This is recognised by many consultees as a key

success factor for what the Trust has achieved, although it also needs to be recognised that such a reliance and perhaps dominance can also be a risk factor for the Trust – something that is considered in Section 4 of this report when the challenges for the Trust are highlighted.

- 2.38 Fourth, some consultees recognise that there has been a *'bit of luck'* or *'good fortune'* associated with how the Trust has engaged with individuals that have become trustees (e.g. through serendipitous meetings between future and current trustees) as well as with external stakeholders. This serendipity has also been supported by the networking and engagement with relevant stakeholders that trustees have been active in throughout the lifetime of the Trust.
- 2.39 Fifth, an important dimension that helped to engage or attract many of the key trustees to the Trust is the **social objective underpinning the activities of the Trust** (i.e. the founding desire of the Trust to make a positive contribution to the regeneration of the economy and community of Prestonpans). Whilst this aim does not currently feature as an explicit part of the Objects of the Trust, it was an important factor for some trustees in their decision to actively engage with the Trust. Given this, it may be that embedding this social objective within the stated Objects of the Trust is something that should be considered going forward. This is considered in more detail in Section 4.
- 2.40 Sixth, a key factor in the achievements of the Trust has been **the strong volunteer/voluntary contributions that have underpinned the range of activities of the Trust** (e.g. the Battle re-enactments and the re-enactors led by the Alan Breck Regiment; the Tapestries and the stitchers; as well as the trustees across all activities). These voluntary contributions have not only underpinned but made possible all of what the Trust has achieved, and their importance is well recognised. Looking forward, the extent to which there is a reliance on such volunteer contributions for the Trust's various achievements needs to be considered in the context of the ongoing sustainability of the Trust.

### 3. FUTURE PRIORITIES OF THE TRUST

#### Introduction to Section 3

3.1 This section presents the findings from the review on terms of the future priorities for the Trust. As part of the consultations, interviewees were asked about the future priorities of the Trust in the context of considering the options for the Trust in taking its work forward over the next 10 years.

#### Battle of Prestonpans Living History Centre

3.2 It is clear from the consultations carried out for this review, as well as the efforts of the Trust that have been made at various points, with varying levels of intensity, over the lifetime of the Trust, that a **key priority for the Trust going forward is the establishment of a permanent centre/venue for the Trust's core activities**. Such a venue is currently, most commonly described as a 'Living History Centre' for the Battle of Prestonpans.

3.3 Reflecting on the consultations with trustees for this review, it is clear that, without exception, the priority of establishing in Prestonpans a permanent centre/venue for the Trust is the **most strongly identified and highest ranked priority going forward**.

3.4 The Trust itself has given prolonged consideration throughout its existence to the establishment of such a Centre, including whether the Objects of the Trust could continue to be achieved without such a Centre, and the Trust has reached the conclusion that a permanent venue/building is required.

3.5 It is envisaged by the Trust that such a Centre will provide a hub or focal point for its various activities, helping to provide a more institutionalised framework through which it can continue to advance the Objects of the Trust. The Trust anticipates that such a Centre would provide a sustainable basis upon which a professional full-time team could be established to continue, and further develop, the work of the Trust.

3.6 Consultations with **external stakeholders** also recognised the ambition of the establishment of a permanent venue/centre – and there was **appreciation about the general rationale for such a centre as well as the potential benefits** it could provide, including recognition from external stakeholders that having a visitor centre would make a statement and increase the profile/presence of the Battle – both generally and specifically in relation to other prominent Scottish battlefields (e.g. Bannockburn and Culloden).

3.7 Alongside this appreciation, there was recognition that further serious and updated consideration would need to be given to **'how realisable' or how sustainable such a venue** would be.

3.8 From its inception in 2006 the Trust has, at various points, taken steps to assess the potential of such a Centre. This includes commissioning an independent assessment of the economic viability of such a Centre,

refreshing this assessment, and seeking the views of the tourist trade – all of which were positive **provided the facility was a world class offer**. The Trust's ambition is to raise capital to create what will become a self-sustaining social enterprise.

- 3.9 Whilst there is consensus about the importance of establishing a permanent centre for the core activities of the Trust as a priority, **the extent to which the concept of the 'Living History Centre' has been clearly articulated and developed varies notably** between consultees. Some consultees have a clear, well-considered understanding about what it could entail, others clearly recognise the ambition for it (but did not articulate what they think it could entail), whilst others recognise it as a priority for the Trust but have given it no further consideration beyond the wider ambition to have such a centre.
- 3.10 Therefore, whilst various attempts have been made in the past (e.g. as part of grant applications to Heritage Lottery Fund; as part of design plans for specific, potential locations for such a centre; as part of feasibility studies; etc.), to clearly set out and articulate what the aims, rationale, objectives, and detailed specification of such a centre would be, **it is clear that it is now an appropriate time for there to be a clear, agreed, (re) articulation of the purpose and objectives of such a centre**, alongside setting out where and how it would enable the Trust to achieve its core Objects.
- 3.11 Whilst the principle of a 'Living History Centre' can be readily perceived as an appropriate means by which to deliver the Objects, and realise the ambitions, of the Trust going forward, there is a clear need for the Trust to articulate how the ambition for such a centre is a means to an end (i.e. to support the achievement of the core Objects of the Trust) rather than simply an end in itself.
- 3.12 As part of this, there are a number of issues to be considered.
- 3.13 At the higher (**strategic**) level the key issues to consider are:
- The **overall remit/coverage of the centre**: i.e. the Trust needs to decide whether the primary/singular focus of the centre is **the delivery of the core activities of the Trust** or whether such a centre can also encompass a broader ancillary remit. For example, such a centre could, reflecting on the Trust's emergent activity patterns since 2006, also seek to:
    - (1) provide a wider perspective (potentially an international narrative) of the Prince's 1745 campaign and his victory at Prestonpans in the **broader Jacobite history** as part of a Jacobite Trail; and/or
    - (2) serve as a host location for delivering the **activities of the Scottish Battlefields Trust** (SBT); and/or
    - (3) provide a setting for telling the story of **other aspects of Prestonpans heritage and history** – at the time of the Battle (e.g. the 1722 Waggonway) and more broadly.

- **The core audience for/visitors to the centre:** inter-twined with the issue above, it will be important for the Trust to identify who the core audience(s) for the centre will be. Each of the considerations above will potentially attract a different type of audience and will impact on the offer and facilities to be made at the centre as well as influencing the potential business model that would underpin the financial viability of the centre.
- The **core purpose and objectives of the centre** – setting out what these are, and clearly identifying how it will support the achievement of the Trust's Objects.

3.14 At the lower (**operational**) level the key issues to consider are:

- **Location** – i.e. what the (preferred) location of the centre will be. Whilst various locations have been considered on previous occasions by the Trust, the balance between finding an optimal location (e.g. somewhere on or proximate to the Battle site) and what is available and realisable will need to be considered.
- **'The Offer' - Content and Specification** of centre – i.e. what will be offered, delivered, provided, and included in the centre.
- The **self-sustaining business model that will underpin the operation of the centre** – i.e. what operational and staffing model will be implemented, how will the centre generate income, how will the financial viability and sustainability of the centre be achieved.

3.15 The identification of a preferred potential location, as well as clarity about the content and specification of the centre, and the most appropriate business model will be helped by addressing some of the higher-level issues set out above as this will provide clarity about the purpose, objectives remit, and audiences for the centre – all of which will help to address these lower level issues.

3.16 The anticipated outcomes of the comparative study of existing successful models of interpretation centres (both national and international) being undertaken in parallel with this External Audit will be invaluable both for insights and also the future potential for shared activities.

3.17 Finally, in relation to this priority, given the importance afforded by many consultees to the ambition for a 'Living History Centre' as a priority for the Trust, it may well be appropriate for this ambition to be explicitly included in the Objects of the Trust and this is something the Trust should consider.

### Other Future Priorities

3.18 Beyond the clear ambition for the 'Living History Centre' the other priorities identified by consultees relate to the Trust continuing to focus on, and deliver, what it has been doing so far.

3.19 There was a consensus amongst consultees around the **Trust continuing to have the same priorities and delivering the same or similar range of activities** in order to achieve/make progress against these priorities.

- 3.20 Specifically, consultees mentioned that the ongoing priorities for the Trust should include:
- Protecting and Interpreting the Battle site.
  - Looking after, and exhibiting, the Tapestries and other art works (e.g. paintings).
  - Continuing to raise awareness and understanding about the Battle through the re-enactments, commemorations and other artistic activities.
  - Continuing to work with schools/education (and the wider community) to increase awareness, understanding and appreciation of the Battle.

### Balancing the Priorities

- 3.21 Whilst consultees clearly identify the key priority of the 'Living History Centre' alongside commonly proposing that the Trust also continues to deliver against the other priorities by maintaining the range of activities that it has been delivering, a **common thread emerged from the consultations about the issues this could create in terms of the capacity of the Trust to deliver against an expanding range of priorities.**
- 3.22 There is concern, especially amongst those actively involved (currently or previously) in the Trust, about the **capacity of the Trust to continue to deliver the current activities and priorities**, and the added pressure that continuing to do so *in addition to* spending the time and resources that would be required to establish the 'Living History Centre'.
- 3.23 Therefore, some consultees wondered whether it might be necessary to do less of (or reduce the scale of) current activities in order to create sufficient capacity to dedicate to the establishment of the centre (*'if we want to do more of X, do we need to do less of Y?'*).
- 3.24 Going forward, the Trust will need to consider the relative importance of its priorities and ensure that there is enough capacity to enable it to deliver all of its ambitions. **Given there is a consensus that the current capacity of the Trust is insufficient for the Trust to be able to continue delivering the ongoing scale of activities as well as establishing the 'Living History Centre'**, the Trust will need to give consideration to one or more of the following:
- Narrowing the scope of the Trust to ensure key objectives (e.g. the centre) are achieved.
  - Reflecting the relative importance of each of the priorities of the Trust and either:
    - Changing (reducing) the number of priorities.
    - Reducing the scale of activity directed towards some of the current priorities.

- Reflecting what can realistically be achieved against each priority within current resources.
- Increasing the capacity of the Trust by expanding the number of/capability of active trustees.
- Increasing (and professionalising) the scale of staff resources available to the Trust whilst maintaining the volunteer engagement and contributions that have been the platform for achievements thus far.

3.25 These issues are considered further in the next section (Section 4) which looks at the challenges for the Trust to address and other issues to consider. In addition, the extent to which each of the above are worthy of serious consideration will become clearer once the articulation of the issues around the 'Living History Centre' outlined earlier in this section are addressed.

## 4. CHALLENGES TO ADDRESS & ISSUES TO CONSIDER

### Introduction to Section 4

4.1 This section sets out the key challenges for the Trust – both in terms of key issues to consider in terms of where the Trust is now, and also the key challenges that need to be considered and addressed if the Trust is to achieve its key objectives going forward.

### Key Current Challenges

4.2 Consultees were asked to reflect on what the current and potential challenges are for the Trust in terms of achieving its Objects now and into the future. These issues are presented under three main headings – issues around governance and leadership; issues for the Tapestries; and issues for the Living History Centre.

### Governance and Leadership

4.3 There are presently a range of challenges and issues to consider for the Trust around its governance and leadership. The key aspects are as follows:

- The Trust should **clarify the scale/level of 'active' trustees**. Some potential consultees (identified as current trustees for this review) declined to be consulted due to no longer being actively involved in the Trust.
- The Trust should **assess the current and required capacity of the Trust** (in terms of both trustees and potentially staff), especially in relation to delivering its priorities into the future.
- It is acknowledged that the Trust has made notable achievements with a **small, dedicated, core team** – and whilst this is a **strength and asset**, it is **also a weakness/risk** in terms of both the (over)reliance on a small number of individuals, the sustainability of the Trust, and as a potentially limiting factor to the ambitions of the Trust going forward.
- Furthermore, given the ambition around the 'Living History Centre', it will be important to **assess the capability and skills of trustees** in this regard – ensuring that there are sufficient skills/knowledge within the Trust **about developing and managing/operating such a centre**.
- Trustees recognise that maintaining existing activities and **achieving the future ambitions of the Trust in particular, cannot be achieved with volunteers alone**. As such, the Trust should seek to resolve how to achieve such ambition whilst maintaining the commitment of volunteers who have supported achievements thus far.
- Finally, on trustees, it would be beneficial for the Trust to **ensure that there is active, local community representation within the trustees**. Whilst this has more clearly existed previously it seems to have fluctuated over time. Such local representation is important and

could provide a number of benefits to the Trust around achieving its future priorities.

- Bringing these issues together – it is **about reviewing the governance and leadership of the Trust and ensuring that the capacity and capability are fit for purpose** in terms of the Trust’s potential to both continue to deliver its objectives and realise its ambitions into the future.
- Another strand of governance for the Trust to consider is around the **current stated Objects of the Trust**. There are four issues here:
  - The Trust could give consideration to **adding the ‘social objective’** (i.e. the desire of the Trust to make a positive contribution to the economy and community of Prestonpans) **as an explicit object of the Trust**.
  - Given its relative importance as a future priority, the Trust could give consideration to **adding the ambition of the ‘Living History Centre’ as an explicit object for the Trust**.
  - The Trust should ensure **clarity of the role and scope of the Trust in relation to the (perceived) overlaps with the Scottish Battlefields Trust**, where some confusion exists amongst external stakeholders.
  - It will be important for the Trust not to overreach itself in terms of expanding or adding to its objects, without ensuring it has sufficient capacity to achieve all of its ambitions. As such, **consideration about narrowing the scope** (prioritising the objects) **and/or increasing capacity** (of trustees and/or staff) **is needed**.

### Tapestries

4.4 Issues around dealing with the Tapestries, especially into the longer term, are linked to wider considerations around the ‘Living History Centre’ for the Trust (which would be the permanent home for the Tapestries). Whilst the issues around the ‘Living History Centre’ are being progressed, Tapestry-specific issues to be considered are as follows:

- There are **requirements about the ongoing conservation, protection, and storage of the Tapestries**, and the Prestonpans Tapestry in particular (exemplified by the recent report by the Scottish Conservation Studio commissioned by the Trust as well as feedback from the Friends of the Tapestries meeting and other consultations). It is necessary for these concerns to be addressed in a timely manner, and to be seen to be addressed by all interested parties – in order to ensure that the Trust’s relationship with the stitchers and other Friends of the Tapestries is maintained, and that any frustrations and tensions arising are addressed and resolved.
- Consideration also needs to be given, in the context of the capacity issues for the Trust, and the ‘Living History Centre’ ambitions, to the short to medium term **plans around the exhibition and touring of the Tapestries**.

- A **wider issue** around the Tapestries **is around the 'clash of perspectives' that exist**. Some perspectives regard the Prestonpans Tapestry as primarily a community art project where the process of making the Tapestry and the stories of the process and those involved are at the core. Other perspectives regard the Tapestry as an important tool for helping to tell the story of the Battle, with the Tapestry regarded as an interpretation device for communicating the narrative of the story. It is important that both perspectives continue to be acknowledged, and that the common ground and mutually beneficial arrangements for the future of the Tapestries are ensured.
- In order to progress this, it is recommended that a **'Forward Plan' is created for the Tapestries** (most specifically for the Prestonpans Tapestry) which clearly sets out the conservation, preservation and storage arrangements; the plans for touring and exhibitions; the eventual permanent displays; and the processes by which decisions about the Tapestries can be made going forward – via a more formalised iteration of the Friends of the Tapestries as a subgroup of the Trust.

### Living History Centre

4.5 The issues and considerations around the Living History Centre (LHC) have been dealt with in detail in Section 3. The key issues can be summarised as follows:

- It is now the necessary and appropriate time for there to be a **clear, agreed, (re) articulation of the purpose and objectives of an LHC**, alongside setting out where and how it would enable the Trust to achieve the Trust's core Objects.
- As part of this, the strategic issues to be considered include:
  - The **overall remit/coverage of the centre** (i.e. whether the primary focus of the LHC is **the delivery of the core activities of the Trust** or whether it will have a broader remit including ancillary objectives).
  - **The core audience for/visitors to the centre.**
  - The **core purpose and objectives of the centre.**
- **Following on from the above, the more operational aspects to address will be:**
  - Identification of the **preferred location** for the LHC.
  - Agreement about the **content and specification** of the LHC.
  - Agreement on the appropriate **scale and level of staff resource** required for the Centre (and the Trust's other ongoing activities).
  - Identification of the **business model that will underpin the operation of the LHC.**

### Other General Issues

- 4.6 In addition to the above, some other issues that the Trust may wish to give consideration to include:
- Many of the activities of the Trust have had, and will continue to have, **positive socio-economic impacts** on Prestonpans and further afield. The development of processes to **collect further evidence on this will help the Trust to articulate and advocate about its contribution** and impact locally, as well as **providing evidence to support future funding applications** (e.g. to HLF).
  - Ensuring that the Trust continues to be **actively engaged and well-embedded in the local community** – engaging with the full range of external stakeholders and organisations at the local level as well as nationally and internationally.

**ANNEX 1: CONSULTEES**

<b>Name</b>	<b>Role and Organisation</b>
Gareth Bryn-Jones	ex-Trustee and Chairman
Kenneth Cameron	Trustee
Herbert Coutts	Trustee and Joint Chair
Andrew Crummy	Tapestry designer and artist
Sharon Dabell	Trustee and author
Marietta Diciacca	Cockenzie House Trustee and stitcher
Iain Gray	MSP for East Lothian
Diarmid Hearns	National Trust for Scotland
Arran Johnston	Executive Trustee, author and stitcher
Steve Lord	1745 Association
Peter McKenzie	ex-Trustee
Gordon Prestoungrange	Trustee and Joint Chair and author
Martin Ross	Historic Environment Scotland
Colin Smyth	MSP for South of Scotland
Sean Wood	The Gothenburg

In addition, re-enactors and visitors to the September 2018 Grand Commemorative Parade and Re-enactment Weekend and attendees at the Friends of the Tapestries meeting in November 2018 all made a helpful input to this review through individual and group discussions that took place; their time and contribution is very much appreciated.

**ANNEX 2: LIST OF RESEARCH, SCHOLARLY AND OTHER PUBLICATIONS**

- Prestonpans – a social and economic history across 1000 years* [2006] Allan AM et al
- Murals Trail and Art Treasures of Prestonpans* [2006 & 2016] Unwin J et al
- Battle of Prestonpans Mural-in-a-Day* [2006] Crummy A et al
- Sir John Cope & the Rebellion of 1745* [1898 reprinted 2008] Cadell Sir Robert
- Rebellious Scots to Crush* [2008] Johnston A
- Archaeological Survey of Battlefield* [2009] Pollard T et al
- Battle of Prestonpans 1745* [2008] MacHardy S
- Battle Game: Battle of Prestonpans* [2008] Veitch G et al
- Off the Wall Art – plays and poetry* [2008] Lindsay J et al
- Battle of Pots 'n Pans* [2008/ 2009] Dallmeyer A et al Tour & Fringe
- A Backward Glance – novel* [2008] Dabell S
- Colonel Gardiner: Vice and Virtue* [2009] Dallmeyer A
- The Onward Journey – novel* [2011] Dabell S
- The White Rose & the Thorntree – novel* [2008] Pugh R
- A Baron's Tale – novel* [2009] Prestoungrange G
- Valour does not wait* [2010] Johnston A
- Prospectus for the Nation – proposals to the Scottish Parliament* [2010] Trustees
- Battlefield Interpretation Boards* [2008/ 2010] Trustees
- The Prestonpans Tapestry – Official Guide* [2010] Crummy A et al
- Stitches for Charlie – DVD telling of creation of Prestonpans Tapestry* [2010] Robinson E
- Battle of Prestonpans – CD music and song of the campaign* [2010] Green I/ Greentrax
- The Prestonpans Tapestry – animated DVD in French & English* [2010] Bayeux Partners
- Battle of Prestonpans – cartoon format in French, Gaelic and English* [2012] Unwin J et al
- Battle & Portrait paintings – Andrew Hillhouse, Kate Hunter and Ronald Elliot*
- Our Blood Stain'd Fields – all the battles of East Lothian* [2013] Johnston A
- Jacobite Traitor* [2011] Roberts A et al
- Battle of Prestonpans 1745 –* [2006 & 2013] Margulies M
- Colonel Gardiner of Bankton House – DVD telling of his life and death* [2017] Trustees
- The Scottish Diaspora Tapestry* [2014 & 2015] Crummy A et al
- Scotland's Diaspora – Double CD music and song from across the world* [2014] Green I/ Greentrax
- The Art of Narrative Embroidery* [2015] Farmer R et al
- On Gladsmuir Shall the Battle Be!* [2017] Johnston A
- Battlefield Walk & 1722 Waggonway, Prestonpans & Diaspora Tapestries - APPs* [2016/2018]
- Memorial Tables to Clans and Regiments at Prestonpans* [2018] Trustees