



the National Trust  
for Scotland  
a place for everyone

# FLOWERING

Summary of the Year Four Corporate Plan  
2015-2016



## Flowering: Summary of the Year Four Corporate Plan, 2015 – 2016

### Introduction

Kate Mavor

Chief Executive

The National Trust for Scotland

This is a summary of the fourth annual Corporate Plan of the National Trust for Scotland's five-year strategy, *Securing the Future of Our Past*. The Strategy was set out at our 2011 Annual General Meeting and will take until the end of the financial year 2016/17 to come to fruition.

In the first Corporate Plan, '**Sowing the Seeds**', we devoted ourselves to putting in place the conditions necessary to begin delivery of the Strategy. We launched 'Signature Projects' to act as proving grounds for enhancing every aspect of our work, we undertook fundamental reviews of our properties and collections and we initiated investment in record-keeping and support and development for our staff and volunteers.

Through the second Corporate Plan, '**Taking Root**', we took the Signature Projects further and we addressed the need to consolidate and improve our detailed planning processes for properties. We also made significant progress with our 'Portfolio Review' which gave us a clearer understanding of our properties' significance and potential, and helped us to identify our investment priorities. We also completed a cost of care exercise for our estate, which told us that we need to raise an additional £46 million over ten years to ensure that the properties we care for are maintained and accessible for current and future generations to enjoy.

Our third Corporate Plan, '**Growing**', aided our navigation through a unique year for Scotland, in which, among other things, we opened the new Battle of Bannockburn centre to great acclaim, commemorated the 700<sup>th</sup> anniversary of the battle and played a full part in the 'Year of Homecoming'. We ensured that the majority of our properties each had five-year forward plans and went further in introducing new Annual Operating Plans which, together with a new staffing structure, give properties more autonomy and local responsibility.

We also made real progress with Signature and Priority Projects, notably the finalisation of 'master plans' for both Brodick and Inverewe, as well as a review of management and conservation on Canna with a new approach that is now being implemented. We increased our membership to a new high of 330,000, improved our communications with a re-launch of our website and raised our voice on issues affecting Scotland's heritage, notably through our May 2014 conference, *Towards a National Heritage Collection?* This in turn fuelled a debate with our wider membership and our peers about the Trust's long-term future and whether or not there is to be *A Place for Heritage* as society evolves and advances deeper into the 21<sup>st</sup> century.

New approaches to fundraising have been put in place, resulting in mailings supported by TV advertising which together set out our stall as we seek the generous help and support we need to conserve Scotland's treasures.

The wonderfully successful President's Ball at Castle Fraser, masterminded by our Vice-President, Angus MacDonald, raised over £0.5 million for conservation projects. We have made great strides in ensuring we practise what we preach through our climate change action plan and by preparing the way for renewable energy projects that will be both ecologically and financially sustainable. Revenues are increasing across all of our commercial activities.

In the past three years it is undeniable that we have had to focus internally on processes, structures and plans; to do the necessary spadework for later dividends. We are now about to enter the fourth year of strategic delivery in which we expect the first '**Flowering**' from those seeds sown in 2012. We are on the cusp of real, long-lasting change; change that is fundamental to the durability and relevance of this great charity.

2015/16 is the penultimate year of delivering our strategy and we will ensure that the results we promised back in 2011 become tangible, not least in taking the final steps towards operational financial breakeven.

Once this is done we will have put the Trust on a firm footing on which we can base new ambitions, with the freedom to make choices that make certain we will flourish as a dynamic and innovative organisation. Our eyes are open as to how tough this is going to be.

We are facing a long-term decline in the numbers of people paying to visit heritage properties and on-going economic turbulence, where the alleged recovery from

one of most persistent recessions in modern times is patchy at best.

There are three major themes in the coming year. Firstly, we are going to encourage wider recognition of the Trust's role in conserving and protecting Scotland's countryside. Many people associate the Trust with castles and great houses, far fewer with wild lands, coastlines and open spaces. Yet, among the earliest Trust properties were places like Glencoe and Burg, acquired not only to stop their sacrifice to fleeting developments but also to ensure that they were accessible to the public. Although we live in an era of the 'right to roam', we need to remind people of the importance of the Trust in ensuring people can enjoy that right and of the need to fund charities facilitating and enhancing it.

Our second theme of 2015/16 will be to look far beyond the 12-month horizon. We will be developing a new Five-Year Strategy, one that will take us to 2022. This will be done under the guidance of a new Chairman, Sir Moir Lockhead. Sir Ken Calman will hand on the baton, after five years of service to the Trust in which he took us from a time of difficulty and despair into a hopeful new era.

The strategy itself will fit into a new, overarching vision for how the Trust should function and the aspirations we should share with our members and our nation by the time of our centenary year in 2031.

Our third theme is partnership. Without the support of thousands of volunteers and countless communities

and organisations in Scotland and elsewhere we simply could not succeed in fulfilling our conservation purposes. You will see references to many such partners in the following plan.

### Format of the Summary Plan

The following pages represent only a brief summary of the key actions that will be delivered by the Trust's staff and volunteers up to the end of February 2016. Detailed presentations on our progress in delivering this plan and our overall achievements with the five-year strategy will be delivered at the 2015 Annual General Meeting and at Local Assemblies. We will also post quarterly updates on progress against performance indicators on our website.

### Scope of the Plan

The plan references only those main actions necessary to continue implementation of the Trust's Five-Year Strategy, *Securing the Future of Our Past*, as published in August 2011. These actions are over and above all normal, on-going operational activity necessary to conserve Scotland's heritage and ensure its accessibility to Trust members and other visitors.

### Delivering the Five-Year Strategy

*Securing the Future of Our Past* is focused on five strategic objectives covering: **The Portfolio and Its Conservation; The Promotion of Scotland's Heritage; Financial Sustainability; Visitor Experience;** and, **Investment in Our People.**

The following key actions are expressed in relation to each objective and dovetail with eight previously identified strategic priorities (Portfolio Review; Advocacy for the Conservation of our Heritage; Signature Projects; Innovative Micro-Projects; Membership and Engagement; Major Fundraising Initiative; Skills Development; and, Staff and Volunteer Reward and Recognition).

By the end of 2016/17, *the Trust will be at the forefront of good conservation practice, with its finances secure and its membership confident of its role as an advocate for the conservation of Scotland's heritage. It will have a clear sense of priorities based upon deeper understanding of the significance of its properties. It will be in a position to pursue longer-term objectives.*

It has not been possible to realise this vision in one go – we are enacting the strategy in stages. For that reason, and appropriately for the custodian of some of Scotland's greatest gardens, we have likened the strategy's delivery to a process of cultivation: the first year required us to '**Sow the Seeds**', in the second year we ensured our plans were '**Taking Root**', then through further encouragement in the third year we saw evidence of the Trust '**Growing**'. In 2015/16 our strategic ambitions will be '**Flowering**' in the form of tangible change and results and, by 2016/17, we will all benefit from the '**Harvest**' all the years of effort will bring.

This fourth corporate plan for implementing the strategy is therefore devoted to '**Flowering**'.

	Actions	Purposes and Tasks	Outputs
<b>Strategic Objective 1 – The Portfolio and its Conservation</b>			
<b>Context:</b> Our portfolio reflects our core purpose (...to conserve and promote our heritage) and vision for the future and can be maintained to a high conservation standard.			
1.1	Each of our sites will see the introduction of a set of relevant benchmarks and will measure Quality Assurance standards to ensure that effective conservation is being undertaken	<ul style="list-style-type: none"> <li>The Trust aims to be at the forefront of good conservation practice. We need to be clear what we mean by this and be able to measure our conservation work against agreed standards of good practice</li> <li>Benchmarking will be integrally applied to Conservation Strategy and Annual Operating Plans</li> </ul>	-100% of properties will have an initial benchmark standard applied
1.2	Delivery of major projects within the Trust's estate: <b>Brodick Castle, Garden and Country Park</b>	<ul style="list-style-type: none"> <li>Brodick was selected as one of two 'Signature Projects' for a 'drains up' review that would elicit learning points that could be applied across our estate in terms of conservation, visitor experience and property management</li> <li>A 'master plan' has been prepared for Brodick and this is now being implemented and will lead to a programme of investment in the castle to improve its conservation, presentation and scope for visitor enjoyment of its collections</li> <li>Highlights for the current year include the development of new infrastructure that will enhance the property's offering to families with children across the gardens and country park</li> <li>We will also submit a planning application for a micro-hydro scheme as a source of renewable energy for the property and the local community</li> <li>Improvements will be made to the presentation and service delivery of the Castle cafeteria</li> </ul>	<ul style="list-style-type: none"> <li>Proposals for new visitor infrastructure in the castle developed by June 2015, with fundraising and delivery to follow within the financial year if approved</li> <li>Micro-hydro planning application submitted</li> <li>Visitor centre cafeteria refurbished</li> </ul>
1.3	Delivery of major projects within the Trust's estate: <b>Canna</b>	<ul style="list-style-type: none"> <li>A review of the management and conservation approach to Canna was concluded in 2014</li> <li>The resulting management plan is now being enacted and will see renewed efforts to highlight the conservation significance of Canna and Sanday and the collections held there, as well as a refreshed working relationship with residents which will underpin future development</li> <li>We will appoint a House Manager/Archivist and commence the digitisation of the valuable Gaelic archival collection held in Canna House</li> <li>We will develop our working relationship with the Canna Community Development Trust and liaise over our conservation management plan and undertake joint discussions around housing and infrastructure</li> </ul>	<ul style="list-style-type: none"> <li>House Manager/Archivist appointed</li> <li>Conservation, repair and use of Canna House will be fully scoped</li> <li>Digitisation of collections will be undertaken</li> <li>Preparation of an archaeological plan</li> <li>Joint stakeholder meetings with and involving the CCDT will take place</li> </ul>
1.4	Delivery of major projects within the Trust's estate: <b>David Livingstone Centre</b>	<ul style="list-style-type: none"> <li>Built as Blantyre Mill in 1785, the David Livingstone Centre was the scene of the world-renowned explorer's birth in 1813.</li> <li>The building is also one of the few remaining tenements from that period and is a stark demonstration of the living conditions of the working class</li> <li>The property is not owned by the Trust (a separate David Livingstone Memorial Trust is responsible) but we have taken on a management role there since 1999</li> <li>We will work with the DLM Trust and other stakeholders, including South Lanarkshire Council, with the objective of preparing a vision and plan that sets out a secure and viable future for the centre: this will help determine what further involvement NTS should have</li> </ul>	<ul style="list-style-type: none"> <li>A decision on the Trust's continued involvement with the David Livingstone Centre will be made by summer 2015</li> <li>Subject to the agreement and support of other stakeholders, the Trust will help prepare and enact plans to secure the property's future</li> </ul>

1.5	Delivery of major projects within the Trust's estate: <b>Newhailes</b>	<ul style="list-style-type: none"> <li>• Newhailes is a symbol of the Scottish Enlightenment: the estate and its landscape are recognised as works of art, of international significance</li> <li>• The designed landscape contains a broad range of native and introduced flora and provides valuable habitat for many species</li> <li>• Since the Trust took ownership of Newhailes in the 1990s, its intention has always been to rejuvenate and revitalise the designed landscape</li> <li>• We will commence restoration of the Flower Garden in accordance with an archaeological survey of the historic garden structure</li> <li>• We will open up access to the former Kitchen Garden and showcase 'Conservation in Action' projects here</li> <li>• Students from Edinburgh College will join us to restore the Ha-Ha and re-establish the setting of Newhailes House within the designed landscape</li> <li>• We will establish an activity and events plan to increase visitor numbers and appreciation of the property as well as enhancing visitor enjoyment</li> </ul>	<ul style="list-style-type: none"> <li>-Re-instatement of the Flower Garden will commence</li> <li>-Conservation of the Ha-Ha will be undertaken</li> <li>-Works at the Kitchen Garden will commence</li> </ul>
1.6	Delivery of major projects within the Trust's estate: <b>The Hill House</b>	<ul style="list-style-type: none"> <li>• Charles Rennie Mackintosh's masterpiece of domestic architecture was commissioned in 1902 and used then state-of-the art and relatively untried approaches to external finishing in order to create a startlingly modern appearance</li> <li>• Unfortunately from the day of its first application the harling has allowed water ingress</li> <li>• After much careful research and consultation we are now ready to apply conservation solutions that will solve the century-old problem and ensure that the building's integrity is not harmed</li> </ul>	<ul style="list-style-type: none"> <li>-Re-harling project scoped and programme of works initiated</li> </ul>
1.7	Undertake a major project to repair and renew driveways at Trust properties	<ul style="list-style-type: none"> <li>• Driveways attached to historic properties were originally intended to withstand the light traffic weight of horses and carts: now they must carry cars and coaches bearing thousands of visitors who want to enjoy our heritage</li> <li>• This means, just like the streets of our cities, towns and villages, wear and tear leads to potholes and other forms of damage</li> <li>• We are therefore embarking on a major project to effect surface repairs in time for the new 2015 season at Branklyn Gardens, Craigievar, Crathes, Drum, Hill of Tarvit, House of Dun, The House of the Binns, Threave and Castle Fraser</li> </ul>	<ul style="list-style-type: none"> <li>-Driveway resurfacing completed at the named properties by April 2015</li> </ul>
1.8	We will review and upgrade the emergency plans in place at all of our properties with collections of fine art and other artefacts	<ul style="list-style-type: none"> <li>• The lessons learned from the recent, tragic fire at the Glasgow School of Art will be applied</li> <li>• Existing emergency plans will be updated to ensure they remain appropriate and compliant with best practice</li> </ul>	<ul style="list-style-type: none"> <li>- 25 properties will have emergency plans based on the new template</li> <li>-Equipment stocks will be audited at these properties and any gaps filled</li> <li>-Development and training programmes for staff will be provided</li> </ul>
1.9	Improve management of conservation data	<ul style="list-style-type: none"> <li>• As part of our drive to improve management information, we will explore the feasibility of introducing a Geographic Information System (GIS) into the Trust</li> <li>• A GIS captures, stores, manipulates, analyses and presents all types of spatial or geographical data, thereby allowing us to monitor the condition of historic and natural landscapes, as well as built heritage</li> </ul>	<ul style="list-style-type: none"> <li>-Produce a feasibility report on the Conservation Data Management International (CDMi) product</li> </ul>

1.10	Prepare the groundwork for the Trust's next strategic plan after 2016-2017	<ul style="list-style-type: none"> <li>• In 2014 we staged a high-level conference about the concept of a 'national heritage collection' and opened a debate about the Trust's long-term future entitled <i>A Place for Heritage?</i></li> <li>• We will continue the debate as we begin the process of developing a new five-year strategy for the Trust to take effect from March 2017, as well as a vision for the Trust's position by the time of its centenary in 2031</li> <li>• Within this, we will consider the long-term wellbeing of the properties in the Trust's care and whether our portfolio is the right one as we respond to the nation's needs</li> </ul>	<ul style="list-style-type: none"> <li>- Options for a new vision statement for the Trust along with strategic direction ready for discussion by the Board of Trustees by March 2015</li> <li>-Presentation of an outline of the vision and approach proposals at the 2015 AGM in September, to be followed by further consultation</li> </ul>
1.11	Delivery of the Trust's Climate Change Action Plan	<ul style="list-style-type: none"> <li>• As we move into the third year of delivering our Climate Change Action Plan, the focus turns to securing funding and implementing resource efficiency measures, as well as concentrating on reducing emissions resulting from business travel</li> <li>• On-going actions include Climate Change mitigation and monitoring with regard to land management and ecosystems, staff engagement and awareness as well as environmental education</li> </ul>	<ul style="list-style-type: none"> <li>-Reduce energy consumption by 10% from 2012/13 baseline</li> <li>-Report on carbon reduction opportunities from garden activities by September and set targets</li> <li>-Maintain and improve Green Tourism Awards</li> </ul>

	Actions	Purposes and Tasks	Outputs
<b>Strategic Objective 2 – The Promotion of Scotland’s Heritage</b>			
<b>Context:</b> We tell the stories of all our properties and collections in compelling and inspiring ways. We encourage the effective protection of our natural, built and cultural heritage.			
2.1	We will raise the profile of the Trust’s countryside and wild land properties and their value to the nation, as well as highlighting the extensive conservation and enabling activities we carry out within them	<ul style="list-style-type: none"> <li>• The Trust’s pivotal role in conserving Scotland’s natural landscapes is one that is often under-appreciated</li> <li>• Our aim is to turn around perceptions and overcome a sense of what we do being taken for granted by raising the profile of our properties and the important conservation work we do at them</li> <li>• We will use our online channels to present our countryside and wild land properties interactively in engaging ways</li> <li>• We will work with a number of commercial partners, such as Google, in order to utilise their platforms and resources</li> <li>• We will enhance the ‘visibility’ of our natural heritage portfolio through the Google search engine and map platform</li> <li>• We will develop a new and flexible membership offer, based on new research, to people who want to enjoy wild land and contribute to its conservation but do not have an interest in a ‘typical’ membership package</li> </ul>	<ul style="list-style-type: none"> <li>-Google Trekker partnership delivered, in situ and staff trained by July 2015, with virtual tours in place on the Google Trekker platform by March 2016</li> <li>-A minimum of 10 outdoor properties to be presented in an interactive online format</li> <li>-New membership offer developed ready to be launched</li> <li>-Launch and communications campaign to support the new offer developed</li> <li>-Additional packages to attract a younger and ‘less engaged’ audience in place</li> </ul>
2.2	Delivery of the Learning and Interpretation Strategy	<ul style="list-style-type: none"> <li>• Our Learning Strategy was approved in the last Financial Year</li> <li>• In 2015/16, we will build on our successful online platforms and continue to raise awareness and use of our digital education resources</li> <li>• We will develop with our property-based learning staff enhanced programmes for formal learning that will be delivered at the Robert Burns Birthplace Museum, Pollok, Culloden, Bannockburn, Culzean, Falkland and Newhailes</li> <li>• In properties without formal learning staff we will prepare formal learning programmes that can be delivered by staff onsite</li> <li>• We will continue to enhance the outdoor learning we offer through our learning teams and Countryside Ranger service</li> </ul>	<ul style="list-style-type: none"> <li>- A 5% increase in digital education activity in the course of 2015/16</li> <li>- Self-assessment toolkit based on HM Inspectorate of Education’s “How Good is Our School?” at each key learning site.</li> <li>-Five properties without formal learning staff will have a programme in place to evaluate the quality of the learning experience</li> </ul>
2.3	We will make sure that our conservation activity and expertise is promoted through a range of mechanisms	<ul style="list-style-type: none"> <li>• In the course of 2014/15, we organised a number of successful seminars and we will build upon these</li> <li>• We have many staff who are experts in the different disciplines linked to the conservation of natural and built heritage and they have fascinating stories to tell and knowledge to share</li> </ul>	<ul style="list-style-type: none"> <li>-We will stage six heritage seminars in the course of 2015/16</li> <li>-We will develop a ‘How to...’ series of video podcasts that will show how conservation expertise can be applied</li> </ul>
2.4	Improving our academic and research linkages	<ul style="list-style-type: none"> <li>• We will make the Trust’s land holdings and resources available for practical and academic research by engaging with Higher Education bodies directly and preparing suggested programmes of research for consideration</li> </ul>	<ul style="list-style-type: none"> <li>-Three partnership research projects/programmes with Higher Education Institutions (HEIs)</li> <li>-A programme of research needs and projects for distribution to HEI bodies and others in place</li> </ul>

2.5	Influencing and informing national debates and policy relating to conservation issues	<ul style="list-style-type: none"> <li>• We will continue to play an active role in developing and implementing the Historic Environment Strategy for Scotland</li> <li>• We will advocate strongly for consideration of the benefits offered by NGO landowners within the current land reform debate and emerging legislation</li> <li>• As part of our process of strategic debate and review, we will take an active part in debates about the wellbeing of wild land and possible modifications to the planning system in response to widespread concerns about inappropriate and over-scaled development</li> </ul>	<ul style="list-style-type: none"> <li>-Participation in the Strategic Historic Environment Forum (SHEF) and Operating Group</li> <li>-Chairing the Participation Working Group of the Historic Environment Operating Group (HEOG)</li> <li>-Liaison with and participation in Scottish Environment LINK and the Built Environment Forum Scotland</li> </ul>
2.6	Reviewing our role as an active advocate for Our Heritage	<ul style="list-style-type: none"> <li>• Feedback from our membership shows that they are keen to build on past initiatives, such as the <i>Land We Love</i> survey, and do more to raise awareness among the public and policy-makers of issues that affect our heritage</li> <li>• We will therefore review the Trust's role as an advocate for heritage and our members' appetite for a stronger campaigning stance</li> <li>• As part of this process, we will establish what we call a 'Heritage Observatory', an approach to scanning our operating environment and identifying the issues and factors that may positively and negatively affect conservation</li> </ul>	<ul style="list-style-type: none"> <li>- Review of the Trust's advocacy approach</li> <li>-Heritage Observatory concept to be initiated</li> <li>-The Heritage Observatory to produce four formal reports</li> </ul>
2.7	We will refresh and reposition the Trust's image in order to appeal to and attract new supporters and members	<ul style="list-style-type: none"> <li>• The Trust conserves the treasures of Scotland's heritage for all to enjoy and we wish to ensure that as many people as possible have the opportunity to appreciate and enjoy our properties as well as sharing our passion for conservation</li> <li>• The Trust must widen its membership base and work towards minimising any barriers resulting from personal circumstances or perception that may prevent people from accessing and enjoying our properties</li> <li>• We will initiate lively seasonal marketing campaigns which will attract new segments of the population</li> <li>• We will also ensure that our marketing activities are fully integrated with property Annual Operating Plans so that the unique character and story of each property is amplified</li> <li>• As part of this we will be revising the style and imagery employed in our communications materials to ensure they are appealing, attractive and engagingly friendly</li> </ul>	<ul style="list-style-type: none"> <li>-Measurement of public perceptions of the Trust through on-going market research exercises</li> <li>-Initiation of seasonal marketing campaigns throughout the course of 2015/16</li> </ul>
2.8	We will offer bespoke retail product ranges which tie into property subjects and themes	<ul style="list-style-type: none"> <li>• The products we sell in our shops should reflect the stories we are trying to tell about our properties as well as generating income that can be invested in their conservation and upkeep</li> </ul>	<ul style="list-style-type: none"> <li>-A total of 24 new ranges to be delivered in property retail outlets</li> </ul>

	Actions	Purposes and Tasks	Outputs
<b>Strategic Objective 3 – Financial Sustainability</b>			
<b>Context:</b> We run the Trust efficiently and within its means, setting and measuring performance against clear targets.			
3.1	Enhanced localised fundraising initiatives and activities introduced	<ul style="list-style-type: none"> <li>Trust properties are already involved in both passive and active fundraising at the local level</li> <li>However, the current total realised in this way could be increased with better supported and designed programmes instituted at properties</li> <li>We will provide support to property-based staff and local supporters and volunteers to help achieve this</li> </ul>	-An additional 50% of income raised through local fundraising to be achieved
3.2	Generate more income through estates management (e.g. agricultural, forestry and property lets) and establish a long-term investment strategy	<ul style="list-style-type: none"> <li>The Trust needs to generate more income from 'non-core' heritage land and property assets, to re-invest in our mainstream conservation activities</li> <li>Following an assessment of the latent value of these non-heritage assets, we have identified a range of investment opportunities and areas for improvement of management practice</li> </ul>	-Generate an income of £1.46 million from property lets (7% increase on 2014/15) - Reduce the number of vacant properties and deliver a programme of rent reviews -Promote targeted commercial investment opportunities integrated with Annual Operating Plans
3.3	Deliver the Trust's renewable energy strategy	<ul style="list-style-type: none"> <li>As a conservation charity the Trust is supportive of renewable energy and sees appropriately scaled and environmentally sympathetic projects as having a place in enhancing our properties and helping us contribute to national targets</li> <li>We will seek significant funding to take forward renewable energy opportunities across a range of properties</li> </ul>	-We will secure significant new external funding packages for key projects by the end of August 2015 -Install biomass boiler at Glencoe by April 2015
3.4	Increased revenues from commercial partnerships	<ul style="list-style-type: none"> <li>The Trust has extant commercial partnerships which offer member benefits, products for sale and promotional opportunities, many of which generate direct income in terms of fees</li> <li>Our intention is to develop these partnerships further in order to realise greater returns for the Trust which in turn can be re-invested in conservation</li> </ul>	-Additional £100,000 of income generated
3.5	We will increase our total net membership by 6,000	<ul style="list-style-type: none"> <li>Our new creative approach and marketing campaigns will help us to encourage existing members to stay with us and also to attract new members from different population segments</li> <li>We will also take steps to improve the number of new members being recruited in the course of visiting our properties in line with targets set out in individual Annual Operating Plans</li> </ul>	- We will increase our membership by 6,000
3.6	To continue with delivery of the Trust's Fundraising Strategy	<ul style="list-style-type: none"> <li>To ensure continued year on year growth of donations, continued refinement and expansion of new and existing fundraising income streams.</li> <li>Continued expansion of prospect and supporter bases.</li> </ul>	-Increase yearly income from donations and appeals to £2.9 million
3.7	Identify the next five micro-projects under the Buccleuch Innovation Awards	<ul style="list-style-type: none"> <li>These small-scale innovative projects are proposed by staff and volunteers</li> <li>Those selected will allow us to better achieve our strategic objectives and will be awarded development funding</li> </ul>	-Five micro-projects announced and underway by April 2015

	Actions	Purposes and Tasks	Outputs
<b>Strategic Objective 4 – Visitor Experience</b>			
<b>Context:</b> We deliver a consistently high quality visitor and membership experience which appeals to a broad range of people.			
4.1	We will include conservation work in progress at our properties as a central part of the visitor experience	<ul style="list-style-type: none"> <li>• It is important that we give members and visitors the opportunity to see just how much effort and expertise goes into the care and conservation of our properties</li> <li>• Experience has shown that visitors are fascinated to see our experts apply their skills to repairs and restoration and it is clear we should not hide scaffolding or work in progress away from the public</li> <li>• In 2014, we made the restoration of a painting, the ‘Mystic Marriage’ at Falkland Palace, a component of what visitors could see on arrival at the property. Based on positive feedback and what we have learnt from this experience, we plan to do more to show ‘Conservation in Action’.</li> </ul>	-In the course of 2015/16 we will aim to stage three ‘displays’ of conservation work in progress at our properties alongside the informal visibility of routine, on-going conservation activities
4.2	Delivery of major projects within the Trust’s estate: <b>Inverewe Garden and Estate</b>	<ul style="list-style-type: none"> <li>• Inverewe was the second of the two properties to gain ‘Signature Project’ status and delivery of its ‘master plan’ is already well advanced</li> <li>• A key project is to upgrade and reconfigure Inverewe House over 12 months in order to bring it back into use as part of the visitor experience, including provision of information and orientation around the unique garden – the works will form part of a ‘Conservation in Action’ demonstration which will be part of the visitor experience in its own right</li> <li>• There are other infrastructural works that will be undertaken in order to improve the staff’s capacity to tend the garden, namely a new glasshouse for the care and propagation of rare and important plant species, as well as the delivery of two new garden shelters which will form part of a new visitor trail along with new interpretation and orientation for visitors of all ages</li> <li>• Inverewe will also be receiving a new ‘Brand’ and visual identity as part of master plan delivery and these will enhance the promotion of the property to potential visitors</li> <li>• We will also be establishing connections with the Wester Ross community and identifying opportunities for collaborative working.</li> </ul>	-Works scoped and initiated at Inverewe House towards completion in 2016/17 -The propagation facility put out to tender and made ‘shovel ready’ -Two new shelters erected -The new brand and visual identity in place
4.3	Delivery of major projects within the Trust’s estate: <b>Drum Castle</b>	<p>Over the last three years there has been a systematic regeneration and reinvigoration of this historic property, including major archaeological and conservation works in the 14th century tower which led to some surprising discoveries</p> <ul style="list-style-type: none"> <li>• As part of this ongoing process the now vacant upper floor of the castle is being converted from domestic use to provide gallery space that will allow the property to stage art and other exhibitions, beginning with collaboration with Aberdeen Art Gallery</li> </ul>	- Gallery conversion complete and first exhibition launched in April 2015 -Works to commence to converting Brew House flat for functions and corporate letting

4.4	<p>Delivery of major projects within the Trust's estate: <b>Culzean Castle and Country Park</b></p>	<ul style="list-style-type: none"> <li>• A fresh conservation management plan and business development framework was prepared for Culzean in 2013</li> <li>• These have yielded a range of investment initiatives linked to visitor orientation and interpretation, building and landscape conservation, improved visitor facilities and commercial opportunities</li> <li>• Key projects for 2015/16 include refurbishment and upgrading of the Eisenhower Apartments and other residential properties in order to increase income levels and offer an enhanced guest experience</li> <li>• We will also improve visitor facilities in the vicinity of the Swan Pond to create a focus point for the enjoyment and appreciation of the Culzean experience by developing currently under-utilised buildings there</li> <li>• We will improve the arrangements and layout of facilities for the welcome, orientation and enjoyment of visitors arriving at the property</li> <li>• We will begin to scope out and deliver redesign and replanting of gardens</li> <li>• There will also be a new 'Brand' and visual identity which will support marketing of the property</li> <li>• We will establish a new working arrangement with South Ayrshire Council as a key stakeholder in Culzean as an amenity and education resource</li> </ul>	<ul style="list-style-type: none"> <li>- Upgrade the play area at the Swan Pond and open for summer 2015</li> <li>-Eisenhower accommodation proposal scoped, costed and brought forward</li> <li>-Garden layout works underway</li> <li>-New brand and visual identity in place</li> <li>-Improved interpretation linked to tours, talks and cookery demonstrations introduced</li> <li>-Entrance and visitor orientation works commenced</li> </ul>
4.5	<p>We will make further investment in the visitor experience offered at our properties</p>	<ul style="list-style-type: none"> <li>• We will continue to build on the successful Visitor Experience Champion programme which ensures that nominated staff are trained to uphold the best customer service standards at each property</li> <li>• More training will be provided in line with targets set out in each property Annual Operating Plan</li> <li>• Feedback from our research and customer comments will be taken to Assistant Directors with a view to shaping and improving training and making changes at property level – such feedback will become a standard tool for business improvement</li> <li>• We will also seek to improve scoring achieved in terms of Visit Scotland Quality Assurance Accreditation, Holiday Accommodation rating, Green Tourism Business Scheme (GTBS ), Mystery Visits, audits and <i>Taste the Best</i></li> </ul>	<ul style="list-style-type: none"> <li>-Grow 'Five Star' rated properties from five to eight</li> <li>-3% increase across key scoring criteria</li> </ul>
4.6	<p>Refurbishment of the retail experience at the Culloden Visitor Centre</p>	<ul style="list-style-type: none"> <li>• Some valuable lessons have been learnt from the merchandising offer made at the new Battle of Bannockburn Centre</li> <li>• These will now be applied to a planned re-fit of the retail area at Culloden</li> <li>• In turn this will include a comprehensive range of new products tied closely to the property's story and ambience</li> </ul>	<ul style="list-style-type: none"> <li>-Refurbishment completed by February 2016</li> </ul>
4.7	<p>We will create an events and promotional programme tied to Scotland's <i>Year of Food and Drink, 2015</i></p>	<ul style="list-style-type: none"> <li>• The latest of the Scottish Government's initiatives to promote Scotland to domestic and overseas audiences is to use 2015 to highlight the country's wonderful variety of quality food and drink produce</li> <li>• We will use the opportunities created by this worldwide promotion to show the quality and range that the Trust can offer at its properties</li> <li>• We will be launching food and drink related events each month around the country as part of this</li> </ul>	<ul style="list-style-type: none"> <li>-Food and drink related events each month aligned to different themes covering history, gardens, education, retail and food &amp; beverage</li> <li>-Achieve 10 <i>Taste Our Best</i> awards</li> </ul>

4.8	Launch and delivery of the <i>My Trust</i> initiative, an online portal for Trust members and registered website users	<ul style="list-style-type: none"> <li>• MyTrust will be an online portal where members and registered website users can log-in to access their details, carry out basic administrative tasks and access exclusive content.</li> <li>• We will deliver a high quality, personal online experience</li> <li>• We will increase customer satisfaction and reduce inefficiencies by automating selected member facilities which are currently 'manual'</li> <li>• We will communicate more effectively with members by the publication digitally of membership communications (such as Scotland in Trust) and make a saving on print costs which is central to our conservation principles</li> </ul>	<ul style="list-style-type: none"> <li>- Completion of a full technical specification by June 2015.</li> <li>- Customer migration strategy &amp; plan in place by July 2015.</li> <li>- Soft (invite only) launch of the MyTrust platform by November 2015</li> </ul>
4.9	To accelerate the achievement of our strategic objectives through formal partnerships	<ul style="list-style-type: none"> <li>• The re-opening of Hutchesons' Hall in Glasgow in 2014 as a restaurant showed how partnership working could shape alternative uses for properties that would ensure they remained accessible to the public and well maintained</li> <li>• We want to take forward similar approaches to see how we can find new ways to benefit our estate and to come up with imaginative ideas for promoting and conserving our properties in the long term, thereby transforming the visitor experience</li> <li>• There is potential at properties as diverse as Culzean, Falkland, Canna, Inverewe, Crathes, Unst and Yell to develop collaboration</li> <li>• We will also develop our collaboration with the Destination Stirling organisation</li> </ul>	<ul style="list-style-type: none"> <li>-Two new formal partnerships signed up</li> <li>-Joint "Hop on/Hop off" bus for Stirling extended during 2015</li> </ul>
4.10	Delivery of major projects within the Trust's estate: <b>Gladstone's Land</b>	<ul style="list-style-type: none"> <li>• 17- century Gladstone's Land is one of the world's original 'skyscrapers' and one of the few remaining examples of Edinburgh's pioneering tenement buildings</li> <li>• Unfortunately the building and its significance have tended to be overshadowed by the nearby attractions of Edinburgh Castle and colourful High Street merchants: the Trust therefore aims to restore the profile of the property to its rightful level</li> <li>• Options leading to firm proposals will be brought forward to increase the attractiveness and improve the interpretation of this unique building</li> </ul>	<ul style="list-style-type: none"> <li>-Conservation and significance appraisal completed</li> <li>-Conservation, management and marketing plan prepared</li> <li>-Fundraising plan put in place</li> </ul>

	Actions	Purposes and Tasks	Outputs
<b>Strategic Objective 5 – Investment in Our People</b>			
<b>Context:</b> Our people are motivated, fairly rewarded and have the right skills.			
5.1	We will conduct an assessment to determine whether the Trust should pursue an application for Investors in People (IIP) status	<ul style="list-style-type: none"> <li>IIP status would be a demonstrable signal of our commitment to improve staff skills and development as our programme of modernisation continues</li> <li>Before we can proceed we need to consider current processes and practices to determine the timescale by which an application could be made and the level of resource we would need to commit within a busy workload schedule for all of our staff</li> </ul>	<ul style="list-style-type: none"> <li>-Decision made on pursuance of an application by the end of August 2015</li> <li>-Initiate an application by the end of February 2016 if it is decided to proceed</li> </ul>
5.2	We will achieve the re-accreditation of Investors in Volunteers (IIV) for the whole Trust	<ul style="list-style-type: none"> <li>The Investing in Volunteers award the UK quality standard for good practice in volunteer management</li> <li>The Trust gained this award in 2010 for outdoor conservation volunteering and again in 2012 for heritage volunteering</li> </ul>	<ul style="list-style-type: none"> <li>-Re-accreditation in place by September 2015</li> </ul>
5.3	We will review and re-focus our investment and approach to People Development, improving the way we target resources, such as on skills and development relating to operational effectiveness, and this will help us nurture and bring forward talented individuals at all levels within the organisation	<ul style="list-style-type: none"> <li>As the Trust changes and our long-term strategy is re-cast, we need to consider the 'recipe' for the skills mix we will need to deliver new goals and to meet new obligations</li> <li>We will address improvement of general management capability within the Trust as we face up to challenges within a turbulent operating environment, including how we deal with future appointments to leadership positions and development issues for existing staff around decision-making, planning, stakeholder relationships, innovation, problem-solving, judgement and operational efficiency</li> </ul>	<ul style="list-style-type: none"> <li>-Draft investment plan ready for consideration by October 2015</li> </ul>
5.4	Provide ongoing training for property staff and volunteers in operating and exploiting the new Electronic Point of Sale (EPOS) systems	<ul style="list-style-type: none"> <li>EPOS is new to the Trust's 'culture' and it will require some time for its use to be 'bedded in' and for the full advantages it offers to be recognised and properly exploited</li> <li>We must ensure the system is used to its full potential and will therefore be carrying out regular onsite checks on compliance with best practice</li> <li>We will also be providing more training on the technical and administrative operation of the system as required</li> </ul>	<ul style="list-style-type: none"> <li>- All EPOS equipped properties' operating systems used optimally by February 2016</li> </ul>
5.5	Providing training and coaching for property-based staff and volunteers on the heritage 'significance' of the places they care for	<ul style="list-style-type: none"> <li>It is vitally important that staff and volunteers based at properties are able to articulate and impart the reasons why their particular property is so important for national and world heritage</li> <li>This is fundamental to our charitable purpose and such areas as interpretation, local fundraising, stakeholder relationships, staff knowledge, visitor experience, conservation planning and much else besides</li> <li>We therefore plan to introduce formal training, linked to career progression and management development, which ensures that the significance of each site is researched and presented effectively and inculcated throughout property teams</li> </ul>	<ul style="list-style-type: none"> <li>-Training and coaching programmes designed and initiated</li> </ul>

## Key Performance Indicators

In addition to the outputs specified in the preceding pages, we will show progress in delivering our actions throughout 2015 – 2016 via a range of Key Performance Indicators (KPIs). These are defined in the following table:

Strategic objective	KPI	Measurement Frequency
The Portfolio and its Conservation	(a) Project spend against previous year	Quarterly
The Promotion of Scotland's Heritage	(a) Membership numbers against budget (b) Number of paying visitors (c) Number of educational visits	All Quarterly
Financial Sustainability	(a) Fundraising achievement against target (b) Number of properties operating to budget	Quarterly
Visitor Enjoyment	(a) Visitor enjoyment survey score (b) Number of visitors (c) Membership profile	(a) Annual (b) Quarterly (c) Annual
Investment in Our People	(a) Staff satisfaction as measured by biennial survey (b) Volunteer satisfaction survey score (c) Average rating for 12 Health and Safety audits conducted during the year (d) A reduction in the number of Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR) incidents	(a) Biennial (b) Annual (c) Annual (d) Quarterly