



the National Trust
for Scotland
a place for everyone

Five-Year Strategy

Securing the future of our past

September 2011

Foreword

Sir Kenneth Calman
Chairman
National Trust for Scotland

Eighty years after the very first meeting of the *The National Trust for Scotland for Places of Historic Interest or Natural Beauty*, held at Pollok House in Glasgow on 27th April 1931, the Trust is tackling some of the most serious and pressing challenges it has ever faced.

The complexity of present and future challenges was recognised by the independent review carried out in 2009/10. It is clear that as a charity we have to change and adapt if we are to survive. We have to ensure that the Trust's purpose is both renewed and meets the aspirations of the membership.

If we are to be worthy of survival, support and partnership, we have to show the nation and the world why what we do is important, and why the land, seas, wildlife, buildings, gardens, art and artefacts we care for are to be treasured.

This strategy distils nearly a year's worth of review, action and engagement with members, visitors, staff, volunteers and other stakeholders and concentrates the results around a common purpose and clear objectives.

We have applied ourselves to the key questions: What is conservation? What is it we are conserving or should be conserving and why are we doing it? How can we bring fresh thinking, energy and innovation to conserving and promoting our heritage?

In this strategy you will find some of the answers, and further plans to resolve the others. There is a real appetite for change within the new Board and management team and we are all committed to the task. The National Trust for Scotland is unique among conservation organisations: our portfolio tells the story of Scotland and Scottish history; the geology that made the land; the land that supports nature; how nature and climate shaped Scots and the places in which they lived; and how our culture, art and notion of enlightenment, as well as our international links, evolved to make us who we are.

We are a charity – a conservation charity and a membership organisation. We are not just custodians; our responsibility is to be much more than that. Our job is to ensure that the story of Scotland is brought to life through the treasures we will pass on to future generations and that we inspire in others a passion for conserving what is beautiful and unique.

This document is the fruit of the widest consultation ever undertaken by the Trust. I should like to thank everyone who has contributed. It illustrates just how passionate we all are about the Trust, its role and its future status in Scotland. I commend the strategy to you and ask for your continuing support in the years to come.



Where we are

As a charitable organisation, we are wholly dependent on the income we receive in order to carry out our work. Sources include membership subscriptions, admission fees to properties, donations and bequests, commercial income (e.g. shops, catering and holiday lets), income generated from our investments and limited government and agency grants.

In 2008, it became abundantly clear that longstanding underlying issues around our reserves and future sustainability had come to a head. A central cause was the fact that the majority of Trust properties taken on over the decades had no (or insufficient) endowments which could generate income to help fund the costs of ongoing maintenance and conservation. In short, there were not enough funds to meet the cost of caring for the properties for which we were now responsible in the long term. Unless urgent action was taken, the situation would quickly deteriorate.

These and other factors prompted the setting up an independent review of the Trust chaired by the Rt Hon George Reid and conducted over 2009/10. The report of the review's findings, *Fit for Purpose*, recommended that:

- The Trust's governance should be modernised through the establishment of a single new Board of Trustees;
- There should be a revised Mission Statement to be debated with members;
- A new five-year strategic plan should be prepared to ensure that the Trust works in future to specific, measurable, attainable, relevant and time-bound objectives;
- There should be an audit of assets and, in particular, a full property portfolio review — to determine the scale, balance and cost of maintenance of the estate and its future management.

The report also advised that the Trust should consolidate its portfolio of properties, partly by divesting itself of 'non-heritage' sites acquired over the decades and partly by seeking alternative means of income generation, management and cost-sharing where appropriate.

The conclusions of *Fit for Purpose* were informed by the views of over 12,000 Trust members and overwhelmingly endorsed at our Annual General Meeting in 2010.

Since then, time and effort have been concentrated on reforming and streamlining governance – elections were held and a new Board of Trustees met for the first time in March 2011 – and on creating this strategy.

The *Tak Tent* consultation over the summer of 2011 gave members and supporters an opportunity to comment on the emerging strategic objectives and options, developed by the Trustees, staff and volunteers through a range of channels.

Our purpose

The purpose of the National Trust for Scotland is to conserve and promote our heritage.

There is consensus amongst our members, volunteers and staff that this is the best expression of why we exist. Although a short and simple mission statement, behind it are a raft of responsibilities and obligations. Its pursuit requires the prioritisation of resources and the making of many difficult choices.

These responsibilities need resources and, most of all, skills and dedication. Conservation is not about preservation in a static, sterile environment - our task is to protect, care for and manage our properties and collections in an ever-changing world so that their significance and importance can be passed on for the benefit and future appreciation of all.

We promote our heritage so that people can experience it for themselves and understand why it is relevant, enjoy and celebrate it, and come to appreciate its national and international significance. Our members have confirmed the role of education as core to our activity.

For a body with charitable status we have taken on the remarkable - and challenging - commitment of caring for 129 heritage properties, including castles, great houses and estates, mills and birthplaces, tenements and flats, crofts and cottages, ruins and historic sites of international significance. We run world-class museums, nurture 76,000 ha of countryside encompassing 46 Munro mountains, 424 km of mountain footpaths, seven National Nature Reserves, 45 Sites of Special Scientific Interest, St Kilda (the UK's only dual World Heritage Site), beautiful coastline, 400 islands and islets, Scotland's first voluntary marine reserve and the habitats of over one million breeding seabirds.

Our responsibility also extends to 35 major gardens, historic landscapes, country parks and walks, 13,500 plant varieties (including national collections), extensive collections of over 100,000 artefacts, from the everyday tools of working life to works of the finest artistic craftsmanship, and the best of interior decoration.

Our commitment to wider conservation in Scotland has included the repair and restoration of almost 200 houses through the Little Houses Improvement Scheme and the establishment of over 400 conservation agreements to protect countryside and buildings.

Taken together, all this represents a unique responsibility for an extraordinary range of properties, from those forged in the beginning of geological creation to those reflecting the sophistication of 20th Century life and culture.

Our guiding principles

Our core purpose is underpinned by the following guiding principles, which we aspire to apply to all future operational activities:

Excellence - We work to the highest standards allowed by our resources in all aspects of our work;

Affordability - We live within our means and use our resources economically and creatively;

Accountability- We discharge our duty of care to the nation and to our members;

Integrity- We are open, respectful and considerate in our dealings with others. We honour our commitments;

Co-operation - We seek to work positively in partnership where appropriate in order to achieve our purpose and fully realise our potential.

Where we are going

We want people to understand the importance of places and things of beauty and historic interest in Scotland and to act responsibly to protect them for future generations. As a result of this 5-year strategy, by the end of 2016:

The Trust will be at the forefront of good conservation practice, with its finances secure and its membership confident of its role in advocating for the conservation of Scotland's heritage. It will have a clear sense of priorities, based on deeper understanding of the significance and potential of its properties. It will be in a position to pursue longer-term objectives.

We aim to deliver this strategy by continually exploring what alternative models exist to achieve our aims and by instilling a culture of innovation across the whole organisation.

The strategy will be delivered through a series of detailed action plans, aligned with the Trust's financial year. These will be reviewed and refreshed as it is progressed.

How we are going to get there

We will fulfil our purpose by taking forward detailed actions meeting five main **strategic objectives** covering :

- **The portfolio and its conservation;**
- **The promotion of Scotland's heritage;**
- **Financial sustainability;**
- **Visitor enjoyment;**
- **Investment in our people.**

Eight **strategic priorities**, embracing elements from the objectives above, will drive forward our strategy and produce tangible results for all to see. These are:

- Portfolio review;
- Advocacy for the conservation of heritage;
- Signature projects;
- Innovative micro-projects;
- Membership and engagement;
- Major fundraising initiative;
- Skills development;
- Staff and volunteer reward and recognition.

Strategic objectives

The portfolio and its conservation

- 1) Our portfolio reflects our core purpose and vision for the future and can be maintained to a high conservation standard.**

Conservation remains at the heart of what we do but we must be certain that we direct our efforts and resources towards properties and landscapes that are truly of national importance. For that reason we have set up the 'heritage portfolio review' to determine the context, significance and resource needs of each property.

This review will help us to optimise the potential for our properties and decide whether we should find other, better means to manage some properties, possibly in partnership with local communities or other agencies. It will also give clarity about potential acquisitions.

The promotion of Scotland's heritage

- 2) 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.**

The Trust's members and visitors are as varied as the properties and artefacts we hold. The one thing that binds them is a love of Scotland's heritage.

We see the Trust as being at the centre of a movement, a common cause of protecting our heritage. We want to enthuse and inspire more people from the widest possible range of backgrounds – in Scotland and elsewhere - to join this cause in order to celebrate and explore our inheritance. In that sense we want to encourage our members and supporters to think of themselves, alongside us, as Scotland's 'trustees', informed and passionate about protecting what is precious to us all. Helping people understand why properties and collections are significant is a key element in promoting our heritage.

We recognise the importance of partnerships with communities, local authorities and other agencies, working with one another, creating an ever-expanding appreciation and enjoyment of Scotland's treasures.

Financial sustainability

- 3) We run the Trust efficiently and within its means, setting and measuring performance against clear targets.**

This is the fundamental building block on which everything else we want to achieve in the next five years - and beyond - depends.

Although we do benefit from government grants and support towards some specific projects, we need to raise most of our income ourselves. The heritage entrusted to us is often inherently expensive to run and unprofitable to manage and, like any other charity, we depend on the generosity of many individuals. We need to get much better at generating our own income, injecting innovation and creativity into harnessing the potential in our estate, in our collections and in our people's talents.

We need to inspire others with our own passion for what we do to win greater financial support from our members and others committed to our cause. In return we know that our supporters expect us to run our organisation efficiently, controlling costs and investing monies wisely in support of our core purpose.

We are committed to tackling the property income shortfall more imaginatively and with vigour so that each property comes as close as possible to sustaining itself.

We have no illusions as to the financial challenge we will need to overcome and the significant level of funding we must seek and generate in order to secure the future of the properties for which we care.

One component priority within our financial objectives is to raise our operating reserve (General Income Fund) to £21 million within five years and sustain it at that level. We anticipate that this will give us the essential secure foundation for all of the other measures.

This is, however, only a first step, and true sustainability in delivering our conservation objectives will require us to raise significantly more funds than ever before. As well as a major fundraising initiative, we will invest in more ambitious and energetic fundraising at all levels, supporting local initiatives as well as national campaigns.

Visitor enjoyment

4) We deliver a consistently high quality visitor and membership experience which appeals to a broad range of people.

Visitor expectations are continually rising. Our aim is for every visitor to leave one of our properties stimulated and enthused by their visit. We want to enhance their visit by ensuring that they discover or learn something they would not find elsewhere.

We recognise that visitors experience each of our different properties in a range of individual ways, from peaceful reflection to communal enjoyment. We will ensure that the interpretation we offer is innovative, challenging and engaging for a wide range of tastes and interests.

We will encourage people to appreciate their place in Scotland, and Scotland's place in history. Scotland is famous for its gift of enlightenment to the world – a tradition we intend to continue.

Investment in our people

5) Our people are motivated, fairly rewarded and have the right skills.

Without our staff and our army of volunteers there would be no National Trust for Scotland.

We will demonstrate the value that we place on our talented and passionate staff and volunteers. We will reward staff at a fair and reasonable level for our sector and ensure that both staff and volunteers are appropriately recognised for their contributions. Acknowledgment will be given for new ideas which further our strategic objectives.

We will identify the skills needed to deliver this strategy and seek to ensure that we have these in sufficient measure through recruitment, training and personal development. Performance management systems will be complemented by our emphasis on the enhancement of leadership skills.

As well as encouraging innovation we will aim to reduce bureaucracy and streamline decision-making. We will guarantee swift and efficient communications systems and support activities at property level.

Strategic priorities

We have identified eight strategic priorities – initiatives that will make a fundamental difference to the future success of the Trust.

Our priorities will be worked into a succession of detailed, fully-costed annual action plans. Different elements of each will be rolled out over five years of active delivery and change.

We will concentrate staff time and resources on delivering these priorities. In parallel we will ensure that ongoing property care and maintenance, as well as routine organisational functions, continue to be observed.

In the next five years:

Portfolio review

We will:

- Complete the formal review, and take the necessary actions arising from its conclusions
- Consider, as a key part of the review, the 'balance' of the portfolio in the light of what is held by others to ensure key historic sites and artefacts are preserved
- Assess the condition, quality and context of our properties so that we can be clear in the short term about investment costs and opportunities and prioritise care and maintenance works
- Assess management and development opportunities within the land and buildings we hold
- Assemble and update comprehensive conservation and business plans for each property

Advocacy for the conservation of our heritage

We will:

- Collate and publicise data drawn from our unique perspective to influence policy in relation to the conservation of Scotland's heritage
- As part of the wider conservation sector, provide an independent voice to government in support of the protection of Scotland's heritage
- Share our expertise concerning heritage issues in public arenas and debates.
- Sponsor and organise a high-level conference that will draw attention to the richness of Scotland's heritage, the expertise required in its conservation and the reasons why it should be exposed to global recognition

Signature projects

We will:

- Develop a selected number of major projects across the country with the objective of using these as the building blocks for a radical re-evaluation of the potential dormant in so many of our properties
- Scrutinise each of these properties in turn to review their operation; how they could generate more income to invest in their conservation; how we might involve members, the local community and partners from private, public and voluntary sectors to develop and then manage them differently; how we might increase the number of visitors and improve their experience; how we might deploy different management models and attract innovative ideas in their support
- Deliver these projects within the next five years and apply the learning from their successful conclusion across the estate

Innovative micro-projects

We will:

- Sponsor five 'seed-corn' projects each year that will enable our staff and volunteers to try out new approaches from which the rest of the organisation might learn and benefit
- Within these, consider projects that may cover areas such as social media, renewable energy, environmental sustainability and engagement with young people

Membership and engagement

We will:

- Revitalise the relationship with members' networks in support of the Trust, e.g. in local Members' Centres or Friends' Groups
- Persuade more members to join us as regular supporters whether they visit properties or not
- Reach out to a wider range of people
- Look at ways in which we can best involve communities interested in particular properties and encourage them to see those properties as 'their' link to Scotland's heritage
- Improve two-way communication and undertake regular member and visitor surveys to ensure we learn from the feedback received

Major fundraising initiative

We will:

- Alongside regular fundraising activity, launch a longer-term campaign to address the underlying shortfall in the Trust's finances
- Develop further our strong links with the Scottish Diaspora to extend our appeal internationally

Skills development

We will:

- Identify the skills required to deliver the Trust's priorities and objectives
- Create a management and leadership development programme
- Develop training solutions to meet identified gaps
- Encourage personal responsibility for skills development and personal growth
- Use our overall performance management process to raise standards and align training and development to the Trust's priorities and objectives

Staff and volunteer reward and recognition

We will:

- Design and implement a recognition scheme
- Benchmark reward and recognition with other relevant organisations and take action, as appropriate
- Create a career development programme

Delivering our strategy

The objectives described in this strategy will be delivered through a series of detailed annual action plans over the next five years. These will include specific, measurable, attainable, relevant and time-bound **targets** and will set out what systems and structures we need for delivery.

The action plans will be revised, updated and published at the beginning of each financial year (currently March) and will be available online at the Trust's website (www.nts.org.uk).

The action plans will inform individual departmental and property plans and the personal development plan of every staff member.

Reporting on progress

We will stage an Annual Assembly at which the centrepiece will be a presentation of outcomes and progress towards meeting our strategic objectives.

At their regular meetings, our Board of Trustees will monitor progress and ensure that performance against key performance indicators (KPIs) is recorded on our website. We will also ensure that local reports are made to communities and members' representative bodies.



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The National Trust for Scotland for Places of Historic Interest or Natural Beauty is a charity registered in Scotland, Charity Number SC 007410

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