



the National Trust
for Scotland
a place for everyone

GROWING

Summary of the Year Three Corporate Plan
2014-2015





Introduction

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THIS IS A SUMMARY OF THE THIRD 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 2016 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 the '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 – 75% of all of our properties now have fully up-to-date plans which set out clear conservation and management objectives. We also made significant progress with our 'Portfolio Review' which gives us a clearer understanding of our properties' significance and potential, helping us identify our investment priorities – this is ground-breaking work which, we hope, will resonate with and inspire other players in fields of conservation and heritage. We have also completed a cost of care exercise for our estate, which tells us that we need to raise £46 million over the next ten years to ensure that the properties we care for are maintained and accessible for current and future generations to enjoy.

We have also refreshed our marketing activities, including a very successful TV advertising campaign (*Hey Scotland, Let's Play!*), and drawn more attention to the wonderful experiences a day out with the Trust can offer. We have improved the way we communicate with our members as evidenced by the refresh of our magazine, *Scotland in Trust* (subsequently award-winning), and the exponential growth in people using our website, Facebook and Twitter feeds. We have reviewed the catering provision at our properties and achieved a turnaround in quality and profitability, rolled out a programme to train 'Visitor Experience Champions' for every property, delivered significant projects at Bannockburn, Hill of Tarvit and Drum among others and geared up our fundraising team for the considerable challenges we are to face.

For all this achievement, everything we did last year was necessarily preparatory in nature, albeit vital for the survival and sustainability of the Trust. Now, in the third year of delivering our strategy, we can expect to see the first shoots of real change and transformation. The roots of change are solidly established and we are now **'Growing'** towards a better future.



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, *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 is not possible to realise this vision in one go – we are enacting the strategy in stages, having undertaken initial building and preparation and now we are delivering in earnest. 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 coming year, we will see evidence of the Trust **'Growing'**, leading in the following year to **'Flowering'** and, in 2016/17, we will all benefit from the **'Harvest'** all the years of effort will bring forth.

This third corporate plan for implementing the strategy is therefore devoted to **'Growing'** and reflects the manifestation of real change in the Trust.

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ACTIONS		PURPOSES AND TASKS	OUTPUTS
Strategic Objective 1 – The Portfolio and its Conservation (continued)			
Context: 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.			
1.4	Open the new visitor centre at Bannockburn	<ul style="list-style-type: none"> The project build and installation of the state of the art new visitor centre, along with landscaping and restorative works around the battlefield, have been successfully delivery The new centre opens to the public in March 2014 and there will be official events and ceremonies in June to mark the 700th anniversary of the battle which will stimulate interest in the centre and will enable the Trust to fulfill one of the key objectives of imparting the historical reality and significance the battle The new centre will offer groundbreaking use of technology in engaging visitors and young people in particular in the this very important chapter in the story of Scotland 	<ul style="list-style-type: none"> The new Battle of Bannockburn Centre opens to members and the public on 1 Mar 2014 Meet visitor number targets in the business plan.
1.5	Review processes to scale up delivery of conservation projects	<ul style="list-style-type: none"> Generous donations and support provide us with the funds to carry out important conservation projects in our properties We must match designated conservation fund to operational delivery and ensure we are able to have the optimum levels of activity carried out 	<ul style="list-style-type: none"> New process agreed by Sep 2014
1.6	Development of a longer-term vision for the Trust's future	<ul style="list-style-type: none"> We have assessed the cost of care of our whole portfolio and developed a sense of the relative heritage significance amongst the properties We are now in a position to ask ourselves how the Trust should best deliver its charitable purpose (to conserve and promote our heritage) alongside other organisations in 21- century Scotland We will conduct a debate with our members, the public and heritage sector and develop a ten-year vision for the Trust as the starting point for our next phase of strategic planning 	<ul style="list-style-type: none"> A high level conference to be staged in May 2014 around the concept of a 'national heritage collection' A poll of members taken over the summer of 2014 'A place for Heritage?' schools competition to be staged from the autumn of 2014 Feedback and thinking about the Trust's future to be debated at the 2014 AGM in Oct A new vision statement for the Trust and strategic directions ready to be incorporated into future planning processes by Feb 2015
1.7	Delivery of the Trust's Climate Action Plan	<ul style="list-style-type: none"> The plan was developed in 2013/14 to reduce the Trust's contribution to climate change through reduced energy consumption, use of renewable energy and staff training The plan also touches on our land management policies and involvement in the Green Tourism Business Scheme Specific targets relate to conservation practice in the face of climate change, reduction in energy use and substitution of fossil-fueled energy sources. 	<ul style="list-style-type: none"> Specific plan targets for 2014/15 met



ACTIONS		PURPOSES AND TASKS	OUTPUTS
Strategic Objective 2 – The Promotion of Scotland’s Heritage			
Context: 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	Delivery of a new three-year Learning and Interpretation Strategy	<ul style="list-style-type: none"> Our new Learning Strategy will enable us to increase education visits by 10%, increase online engagement by 10% (e.g. downloadable teacher packs) and increase participation in outdoor learning programmes by 5% 	<ul style="list-style-type: none"> Learning Strategy targets met by February 2015
2.2	Introduction and delivery of a conference and heritage seminar programme	<ul style="list-style-type: none"> As part of our efforts to be advocates for heritage and to promote understanding and enjoyment of this, we will organise gatherings designed to help us achieve this A conference in May 2014 will attract key contacts in the sector from Scotland and elsewhere to look at the ‘bigger picture’ for heritage in Scotland We will also organise seminars which will focus on specific conservation topics in detail 	<ul style="list-style-type: none"> High level conference staged in May 2014 Six conservation seminars staged in the course of 2014/15
2.3	All Trust Property Managers to incorporate communications objectives within their Property Plans	<ul style="list-style-type: none"> Property-based staff and volunteers will be supported and encouraged to identify local communications activity and stakeholder engagement opportunities that will help them meet their overall objectives This will lead to more localised control and flexibility In the foregoing year, 75% of properties were able to prepare and sign up to local communications objectives to help them deliver the main property plans – the remaining 25% will do the same in 2014/15 	<ul style="list-style-type: none"> 100% of properties to have incorporated communications plans (to include community engagement) into Property Plans by Mar 2015
2.4	Improving our academic and research linkages	<ul style="list-style-type: none"> We will forge partnerships with research bodies so that academic research can be initiated and facilitated through our properties We will encourage and contribute research that will help build up our own and wider expertise in conservation and heritage tourism management 	<ul style="list-style-type: none"> Recruit a research worker to develop external links Publish a list of all current and potential research projects on the Trust estate. Produce a manifesto for working with HEIs to foster research into conservation-related topics. –
2.5	Active advocacy work	<ul style="list-style-type: none"> We will be advocates for the value of volunteering as a key element in public wellbeing and happiness We will also continue to work closely with the Historic Environment Policy Unit of the Scottish Government as the new Historic Environment Strategy is rolled out and in protecting the trust’s interests as the new Historic Scotland (formed from the merger of Historic Scotland and RCAHMS) comes into being We will advocate for consideration of the benefits offered by NGO landowners within the current land reform debate 	<ul style="list-style-type: none"> Report on the value of volunteering by Jun 2014 Participation in the national Historic Environment Strategy working groups Formal contribution to the Land Reform consultation in 2014



ACTIONS		PURPOSES AND TASKS	OUTPUTS
Strategic Objective 3 – Financial Sustainability			
Context: We run the Trust efficiently and within its means, setting and measuring performance against clear targets.			
3.1	Continuing progress towards achieving financial break-even	<ul style="list-style-type: none"> We will continue to work towards achieving a break-even position in our operating budget by the end of the five-year strategy period aiming to cover recurring costs with recurring income 	– Deliver plan on budget (operating deficit of £900k)
3.2	Initiate and support renewable energy projects	<ul style="list-style-type: none"> We believe there is considerable potential for the generation of renewable energy through appropriate means within our estate, which in the long run could reduce our operating deficit while contributing to environmental targets This could range from relatively small to much larger schemes with capital costs in the order of circa £10 million We will also explore potential partnerships that will enable us to take on the more challenging, larger scale initiatives 	– £5 million renewables investment fund in place by Mar 2015
3.3	Recruit an additional net 4,000 new members during the course of the year	<ul style="list-style-type: none"> Increased membership helps sustain the Trust and is critical to our responsibility to share and promote the treasures of Scotland's heritage 	– Net increase in Trust membership by 4,000 to a total of 324,000 by Feb 2015
3.4	Increase revenues from commercial partnerships	<ul style="list-style-type: none"> We will seek further commercial partnerships to provide revenue streams and/or reduce operating costs 	– Additional income of £50,000 generated by Feb 2015
3.5	Meet fundraising targets and increase the contribution donations and bequests make to the running of the Trust	<ul style="list-style-type: none"> In the course of the foregoing year we started to implement a new strategy to significantly increase our annual fundraising income The money we raise will be used to secure Scotland's heritage on a sustainable basis In 2014/15 we will grow the contributions made through our fundraising activities to £3.8 million excluding legacies We will also work to secure existing grant income and capitalize on opportunities arising from a successor to SRDP 	– £3.8 million of funds (excluding legacies) raised by Feb 2015
3.6	Improve IT resilience and efficiency	<ul style="list-style-type: none"> As a necessary component of our disaster recovery plan and the minimisation of risk and financial loss, we will install a new mirror server offsite to ensure our operational continuity We will also continue to roll-out a four-year replacement programme for all desktops and laptops in order to improve operating efficiency 	<ul style="list-style-type: none"> New mirror server installation complete by Jun 2014 250 laptops and desktop machines upgraded or replaced by Feb 2015



ACTIONS		PURPOSES AND TASKS	OUTPUTS
Strategic Objective 3 – Financial Sustainability (continued)			
Context: We run the Trust efficiently and within its means, setting and measuring performance against clear targets.			
3.7	Continue to progress the roll-out of EPOS to our properties	<ul style="list-style-type: none"> EPOS (Electronic Point of Sale) provides 'real time' capture of membership and visitor information, including the preferences and choices of our retail and catering customers This information allows us to be more responsive to customer needs Having begun roll-out in the foregoing year, we will continue the process and ensure all of our larger properties are fully equipped 	– 38 properties to be EPOS equipped by Apr 2015
3.8	Support a further five projects under the Buccleuch Innovation Award Scheme	<ul style="list-style-type: none"> These small-scale innovative projects are proposed by staff and volunteers Those selected will improve operational efficiency, help change the working culture of the Trust and allow us to better achieve our core purpose and will be recognised through prizes granted via the "Chairman's Fund" We have supported five projects in 2012/13, another five in 2013/14 and we will recognize and support five more in 2014/15 	– Five BIAS projects selected and underway by Feb 2015



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Strategic Objective 4 – Visitor Experience			
Context: We deliver a consistently high quality visitor and membership experience which appeals to a broad range of people.			
4.1	Invest in the improvement of visitor experience at our properties	<ul style="list-style-type: none"> We will build on our successful Visitor Experience Champions programme through further investment in training and as part of the property planning process All priority projects will address visitor enjoyment in particular in their proposals Support properties in attracting more people to events by providing web-based marketing materials 	<ul style="list-style-type: none"> Improved scores for visitor enjoyment in our annual independent survey Improved scores for Mystery Visit and VisitScotland quality assurance gradings

Strategic Objective 5 – Investment in Our People			
Context: Our people are motivated, fairly rewarded and have the right skills.			
5.1	Broaden representation on staff and volunteer matters	<ul style="list-style-type: none"> We recognise that we need to widen staff and volunteer feedback in order to conduct effective staff and volunteer relations To this end, we will include representatives of both volunteers and seasonal staff in regular meetings with management and trade unions 	<ul style="list-style-type: none"> Seasonal and volunteer representatives recruited and participating by Sep 2014
5.2	Develop formal processes to ensure talent management and succession planning	<ul style="list-style-type: none"> We need to retain and motivate our most talented staff and volunteers in order to sustain the pace of change and innovation within the Trust At the same time we must have others ready and trained to step in and take over 	<ul style="list-style-type: none"> Formal plan developed by Sep 2014
5.3	Attain the Healthy Working Lives Silver award	<ul style="list-style-type: none"> Following our efforts to secure the Healthy Working Lives Bronze Award, we will move to the next stage Healthy Working Lives offers mutual benefits to the staff and the Trust alike – staff can enjoy better wellbeing as a result; the Trust will lose less hours as a result of ill-health. 	<ul style="list-style-type: none"> HWL Silver Award attained by Feb 2015
5.4	Initiate efforts to attain Investors in People status for the Trust	<ul style="list-style-type: none"> We will assess our current position and plan how to attain the award 	<ul style="list-style-type: none"> Plan developed by Sep 2014



