



The National Trust
for Scotland

CORPORATE PLAN 2005 – 2008

STRATEGIC PLAN

April 2005

CONTENTS

1.	MISSION VISION AND CHALLENGE	<i>page 3</i>
2.	THE CORPORATE PLAN	<i>page 4</i>
3.	PERFORMANCE INDICATORS AND MONITORING	<i>page 5</i>
4.	STRATEGIC AIMS AND OBJECTIVES	<i>page 6</i>
	Conservation	<i>page 6</i>
	Access Enjoyment and Education	<i>page 7</i>
	Influence and Reputation	<i>page 8</i>
	Organisation and Resources	<i>page 9</i>
5.	FINANCIAL OVERVIEW	<i>page 11</i>
Appendix 1	BACKGROUND INFORMATION	
	1. ABOUT THE TRUST	<i>page 13</i>
	2. OPERATING ENVIRONMENT	<i>page 15</i>
	3. ABOUT THIS CORPORATE PLAN	<i>page 18</i>
	4. REVIEW OF 1999 – 2004	<i>page 20</i>
	5. GLOSSARY	<i>page 22</i>
Appendix 2	FINANCIAL INFORMATION	
	1. INTRODUCTION TO THE TRUST'S ACCOUNTS	<i>page 24</i>
	2. FINANCIAL INFORMATION	<i>page 25</i>

1. Mission, Vision and Challenge

Our Mission

The conservation charity that protects and promotes Scotland's natural and cultural heritage for present and future generations to enjoy.

Our Vision

Scotland's rich and diverse heritage is truly inspiring. By championing this heritage, and through excellent stewardship, the Trust will create exciting opportunities to benefit everyone.

Our Challenge

The emphasis of our programme over the coming years will widen from a primary focus on the management of our properties towards an equal recognition of the benefits that heritage conservation can generate for the people of Scotland and all others who share this interest. These benefits range from social, economic and educational gains to environmental, cultural and spiritual values, so the challenge for the Trust will be to engage with the public in demonstrating these benefits in a way that is dynamic and inspiring.

This Plan sets out how we intend to achieve this. Some of the key elements include:

- Presenting our heritage in a way that is socially relevant and inclusive;
- Creating opportunities for meaningful engagement through volunteering, education and life-long learning;
- Emphasising the diversity of the Trust's activities, ranging from the care of some of Scotland's most significant buildings, collections and gardens to the conservation of the country's finest landscapes and marine environments;
- Aspiring to the best international standards of stewardship in the way we manage all our assets, including our people, properties and resources;
- Demonstrating the highest standards in our customer care and visitor experience;
- Championing creativity and innovation in all our activities;
- Advocating change in government policies and practices based on an appreciation of the benefits of conserving our heritage;
- Valuing our staff and investing in their development;
- Ensuring that the resources at our disposal are adequate to achieve the highest standards of stewardship of the assets in our care.

The Trust is unique in that its activities cover the full range of the cultural, built and natural heritage. Our challenge is to make this heritage relevant to the lives of the people of Scotland and all others who have an interest in Scotland's magnificent heritage.

You can find more information about the Trust in Appendix 1 Section 1.

2. The Corporate Plan

This plan sets out our strategy for the three years 2005 – 2008. It shows how we will build greater support for our ongoing conservation work and campaign on key issues to champion the cause of heritage conservation both within Scotland and internationally. Our Strategic Aims are summarised below and you can find more detail about the objectives and initiatives we need to undertake to achieve our aims in Section 4 of this document.

STRATEGIC AIMS

- Deliver core conservation work to the standards of our Conservation Principles
- Inspire the widest possible audience to enjoy Trust properties and support our conservation values
- Champion the cause of Scotland's heritage and build awareness of the full range of our activities
- Develop our culture, systems and skills to operate more effectively, efficiently and sustainably

The Corporate Plan consists of two parts: this document, which is the Strategic Plan, and a separately bound document called the Annual Implementation Plan. The Strategic Plan sets out the medium term approaches the Trust is taking to achieve its long term Vision. The progress made towards the Vision is measured against a set of Key Performance Indicators detailed in Section 3. The Annual Implementation Plan is revised each year, it gives an overview of which aspects of the Strategic Plan are to be taken forward over the course of one year, and is drawn up in conjunction with the annual budget process.

You can find more detailed information on how the Corporate Plan fits in to the Trust's planning structure, and on our monitoring and reporting mechanisms in Appendix 1, Section 3.

3. Performance Indicators and Monitoring

Over the three year life of this Corporate Plan, we will measure our success against the following Outcomes, reporting progress annually in our Annual Report.

Desired Outcome	KPI and Measure
<p>1. Efficient delivery of Trust's core conservation responsibilities</p>	<ul style="list-style-type: none"> ● <i>Conservation Performance Indicator. Measure = Annual Conservation Performance Rating (Indicator to be developed)</i> <p>Interim Indicators:-</p> <ul style="list-style-type: none"> ● <i>Delivery of Scottish Natural Heritage Countryside Management programme. Measure = Annual report against targets</i> ● <i>Drawdown of Historic Scotland Annual Maintenance Grant. Measure = annual % spend against targets</i>
<p>2. Enhanced enjoyment of Trust properties</p>	<ul style="list-style-type: none"> ● <i>Visitor Satisfaction. Measure = Annual % rating in Visitor Surveys and Mystery Visit surveys</i>
<p>3. People encouraged to feel that the Trust is a relevant and worthwhile organisation</p>	<ul style="list-style-type: none"> ● <i>Profile of Membership. Measure = % Growth in membership in target market segments</i> ● <i>Focus Group. Measure = Annual satisfaction rating</i>
<p>4. Trust input influences the national debate to promote heritage interests</p>	<ul style="list-style-type: none"> ● <i>Opinion Former Survey. Measure = Annual rating through questionnaire survey</i>
<p>5. Improved staff morale and motivation</p>	<ul style="list-style-type: none"> ● <i>Staff satisfaction. Measure= Annual Rating in Staff Satisfaction Survey</i>
<p>6. Achievement of financial sustainability of Trust operations</p>	<ul style="list-style-type: none"> ● <i>General Income Fund. Measure = status of unrestricted reserves</i>
<p>7. Improved management of risk</p>	<ul style="list-style-type: none"> ● <i>Robust risk identification and mitigation strategies. Measure = Annual Report rating on Risk Register</i>

4. Strategic Aims and Objectives

CONSERVATION

❖ Strategic Aim 1

DELIVERING CONSERVATION

We will...

Deliver core conservation work to the standards of our Conservation Principles

This part of the plan sets out how we conserve and manage our properties. Our good name is largely founded upon the quality of our conservation work: major projects, such as the conservation of Newhailes or recovering wild land quality by track removal on Mar Lodge Estate, position the Trust as a dynamic and cutting-edge conservation body. However, good conservation is just as much about routine care and maintenance as it is about high profile projects, and financing this activity is an ever-growing burden for the Trust. To achieve the highest possible standards of conservation and make the best use of our resources we need to concentrate on the following priorities over the plan period:

- **Standards:** Our Conservation Principles define our best practice approach to caring for our properties; our challenge is now to deliver on our principles.
- **Planned Maintenance:** Developing planned conservation management regimes is the best way to prioritise work and monitor the conservation “health” of our properties.
- **Best Management:** Currently, the main management model for our properties is ownership and operation as heritage visitor attractions. Over the plan period, a concerted effort will be made to explore alternative management models which are compatible with our primary conservation and access responsibilities and make best use of resources.

<p>❖ Strategic Objective 1.1</p> <p>Ensure our property management activities comply with our Conservation Principles</p>	<p><i>Priority Initiatives</i></p> <p>1.1.1 Determine and implement appropriate conservation quality assurance standards and guidelines</p> <p>1.1.2 Develop better understanding of the properties by undertaking surveys and research to make good conservation decisions</p> <p>1.1.3 Complete coverage of Property Statements to agreed rolling programme</p>
<p>❖ Strategic Objective 1.2</p> <p>Give priority to maintenance and continuing care of properties</p>	<p><i>Priority Initiatives</i></p> <p>1.2.1 Develop, resource and implement planned conservation management regimes, across all conservation sectors</p> <p>1.2.2 Develop suite of conservation indicators to monitor effectiveness (see Section 3, KPIs)</p>
<p>❖ Strategic Objective 1.3</p> <p>Develop alternative property management strategies to deliver our conservation objectives</p>	<p><i>Priority Initiatives</i></p> <p>1.3.1 Following the Sustainability Assessment (see Initiative 4.5.2) assess alternative management models which can deliver conservation and access objectives within organisational sustainability</p> <p>1.3.2 Ensure all future acquisitions are subject to rigorous analysis through implementation of our Acquisition Policy</p>

ACCESS ENJOYMENT AND EDUCATION

❖ Strategic Aim 2

ENGAGING WITH PEOPLE

We will...

Inspire the widest possible audience to enjoy Trust properties and support our conservation values

This part of the plan focuses on how we benefit people by our ownership and management of heritage places and these issues are further defined in our *Access, Enjoyment and Education Principles*. Our properties and the skills and expertise within the Trust represent enormous potential as an educational resource, on many levels. Research tells us that the majority of our current visitors and supporters come from a relatively narrow section of society, and that many more people could be encouraged to engage with the Trust and its values and to benefit from our heritage. Therefore the plan concentrates effort upon:

- **Access and Audience:** Our aim is to make everyone welcome at our properties and to encourage the widest possible range of people to visit them. We need to improve our marketing strategy to reach more people from a wider range of backgrounds, ensuring we understand their expectations and then work to deliver the experiences they want.
- **Service Standards:** We aim to provide a great visitor experience at each and every property and this depends upon provision of excellent customer care, visitor services and facilities. These are vital factors in building our relationship with visitors and customers, and have a lasting impact upon the Trust's reputation.
- **Enjoyment and Learning:** Our principal aim in managing our properties is to enrich peoples' lives by inspiring them to engage with Scotland's heritage on many different levels. The two main mechanisms to achieve this aim are the ways in which we present and interpret our properties, and the range of opportunities we provide to encourage learning. As we seek to widen the audience we serve, we must continue to be innovative in our approach to interpretation and education.
- **Stakeholder Involvement:** We need to encourage more people to become supporters of the Trust and to understand better how we can bring a wider range of benefits to them. This means we must actively seek the involvement and participation of a wide range of stakeholders in how we manage our properties and, in particular, develop more meaningful relationships with their local communities.

<p>❖ Strategic Objective 2.1</p> <p>Encourage more people from a wider range of backgrounds to become visitors and supporters</p>	<p><u>Priority Initiatives</u></p> <p>2.1.1 Implement Marketing Strategy</p>
<p>❖ Strategic Objective 2.2</p> <p>Assure the quality of visitor experience at all Trust properties</p>	<p><u>Priority Initiatives</u></p> <p>2.2.1 Continue to improve provision of visitor services</p> <p>2.2.2 Continue to improve customer care by developing our Conservation through Customer Care programme</p>
<p>❖ Strategic Objective 2.3</p> <p>Offer a wide range of opportunities for enjoyment and education at Trust properties</p>	<p><u>Priority Initiatives</u></p> <p>2.3.1 Continue to provide innovative range of opportunities for lifelong learning</p> <p>2.3.2 Implement programme for upgrading interpretation at properties</p>

<p>❖ Strategic Objective 2.4</p> <p>Increase the Trust's engagement with customers, communities and stakeholders</p>	<p><u>Priority Initiatives</u></p> <p>2.4.1 Develop best practice in social inclusion and disseminate throughout the Trust</p> <p>2.4.2 Deepen customer relationship at property level to promote volunteering and more active support for NTS</p> <p>2.4.3 Actively seek community involvement in Trust properties and their management</p>
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INFLUENCE AND REPUTATION

❖ **Strategic Aim 3**

MOBILISING OUR REPUTATION

We will...

Champion the cause of Scotland's heritage and build awareness of the full range of our activities

This part of the plan focuses on our advocacy role and our ability to engage with people and the wider political agenda at a strategic level. To become more effective as advocates on behalf of all Scotland's heritage we must concentrate on the following areas:

- **The Value of Heritage:** Most people recognise that heritage offers many benefits, but defining these benefits and putting a value upon them is extremely difficult. However, to make a real impact upon the political and economic agenda, the Trust must be able to communicate these additional values and measure the benefits to make a strong case for heritage on these grounds.
- **Our Image and Message:** Our challenge here is to ensure that government and the public understand our commitment to the full spectrum of heritage and conservation issues, and that we are recognised as an inclusive, outward-looking and forward-thinking organisation.
- **Membership and Support:** The Trust's membership base is already strong and offers further opportunities for support in many areas of our work. Encouraging members and communities to become more active stakeholders in the Trust through good two-way communication is key to securing their commitment and to encouraging new audiences to support our work.
- **Campaign Agenda:** While the Trust can do much to lead by example in the good conservation management of our properties, the leverage we can bring through effective advocacy and partnership with others to promote conservation interests throughout Scotland is potentially very powerful. We need to resource more work in this area, identify those issues on which we can campaign most effectively and then deliver this programme.

<p>❖ Strategic Objective 3.1</p> <p>Raise awareness in government and the public of the contribution of heritage to national life</p>	<p><u>Priority Initiatives</u></p> <p>3.1.1 Demonstrate the roles and values by which Trust properties deliver cultural, economic, environmental and social benefits</p> <p>3.1.2 Promote heritage as a major contributor to the well-being of Scotland</p>
<p>❖ Strategic Objective 3.2</p> <p>Ensure greater public understanding of the Trust and support for its activities</p>	<p><u>Priority Initiatives</u></p> <p>3.2.1 Promote the full range of Trust activities through the External Communications Strategy</p>

<p>❖ Strategic Objective 3.3</p> <p>Strengthen and deepen our relationship with our members and reach out to new audiences</p>	<p><u>Priority Initiatives</u></p> <p>3.3.1 Implement Membership and Recruitment strategy</p> <p>3.3.2 Develop strategy to encourage members to commit greater support to NTS e.g. by donation or volunteering</p>
<p>❖ Strategic Objective 3.4</p> <p>Develop policy and advocacy agenda to champion Scotland's heritage</p>	<p><u>Priority Initiatives</u></p> <p>3.4.1 Develop capacity to increase policy and advocacy work</p> <p>3.4.2 Identify relevant issues and develop campaign strategies</p>

ORGANISATION AND RESOURCES

❖ Strategic Aim 4

DEVELOPING ORGANISATIONAL CAPACITY

We will...

Develop our culture, systems and skills to operate more effectively, efficiently and sustainably

This part of the plan concentrates on how we operate as a business. We have identified the following areas as priorities for action over the plan period:

- **Risk Management:** Risk identification and mitigation, including statutory compliance are essential to our ability to continue to operate and to manage our business effectively.
- **Communication:** We are a diverse and complex organisation with a large team of staff and volunteers spread throughout Scotland. Good internal communication is vital to ensure we all share the same vision and can progress our commitment to conservation, access, enjoyment and education.
- **People Development:** Our success depends upon the commitment, goodwill and hard work of our staff and volunteers; having agreed values embedded in our culture will help motivate the workforce to pull together more effectively towards common goals.
- **Skills Development:** Developing the right skills among our staff and volunteers is the only way we can succeed in making the organisation run efficiently and produce the results we want. Continually improving our procedures and practices and investing in training and professional development are therefore key initiatives.
- **Integrated Planning, Budgeting and Reporting:** The sheer volume and cost of the task which faces us is a constant challenge, so in order to make best use of resources it is essential that work is planned and prioritised through an integrated internal planning structure. This mechanism will implement our priority initiatives, will ensure budgeting and resource allocation focus on corporate objectives, and will encourage robust monitoring of results and reporting against targets.
- **Financial Sustainability:** Our statutory responsibilities for conservation and access constitute an enormous financial burden which the Sustainability Assessment (see Objective 1.3) is in process of calculating. We need to become ever more professional in generating income, both by commercial activity and in fundraising, and in the rigorous control of our costs.

<p style="text-align: center;">❖ Strategic Objective 4.1</p> <p>Ensure the Trust identifies and takes action to mitigate the risks to all its operations</p>	<p><u>Priority Initiatives</u></p> <p>4.1.1 Develop Risk Register and implement mitigation measures</p> <p>4.1.2 Prioritise resources to ensure full compliance with statutory requirements</p>
<p style="text-align: center;">❖ Strategic Objective 4.2</p> <p>Embed core organisational values and operating principles throughout the organisation</p>	<p><u>Priority Initiatives</u></p> <p>4.2.1 Develop and agree core organisational values that will inspire and motivate our staff and volunteers</p> <p>4.2.2 Implement Environmental Policy and raise awareness of environmental issues throughout the organisation</p>
<p style="text-align: center;">❖ Strategic Objective 4.3</p> <p>Demonstrate commitment to value and develop staff and volunteers</p>	<p><u>Priority Initiatives</u></p> <p>4.3.1 Continually review employment terms and conditions in negotiation with the recognised Trade Union</p> <p>4.3.2 Ensure all staff and volunteers actively participate in induction and performance management systems</p> <p>4.3.3 Invest in staff training and development to support strategic objectives</p> <p>4.3.4 Actively manage the internal communication processes across all levels of the organisation</p>
<p style="text-align: center;">❖ Strategic Objective 4.4</p> <p>Develop integrated planning and monitoring systems for all Trust activities</p>	<p><u>Priority Initiatives</u></p> <p>4.4.1 Develop and roll out integrated planning and budgeting systems across the organisation</p> <p>4.4.2 Develop monitoring and reporting systems and culture of accountability across the organisation</p>
<p style="text-align: center;">❖ Strategic Objective 4.5</p> <p>Continue to develop organisational capacity to achieve financially sustainable operations</p>	<p><u>Priority Initiatives</u></p> <p>4.5.1 Secure the funding necessary for the revenue and capital finances required by the Trust</p> <p>4.5.2 Complete Sustainability Assessment (see also Initiative 1.3.1)</p>

5. Financial Overview

Background

The Organisational Review adopted by the Trust in 2002 set out three stages for our financial development:

- i. The short-term (2002 - 2003) - improved cost control and financial accountability to bring the Trust's finances into order;
- ii. The medium-term (2003 - 2006) - delivery of budget targets for our operations to haul the finances progressively back to breakeven;
- iii. The long-term (2006 - 2012) - delivery of a sustained up-lift in revenue generation to build our unrestricted reserves for longer-term security.

We have been remarkably successful over the last three years in delivering this programme. Our operations have recovered from a deficit in excess of £2million in 2001 to a position of near breakeven by 2005, whilst our unrestricted funds (the General Income Fund) is back in surplus. Our finances are now in a much stronger position than three years ago, and we are progressively building the secure financial platform needed for future growth.

Financial Strategy 2005 - 2008

We are now entering the final longer-term phase of our financial programme with the focus on growing our income generation to replenish the unrestricted reserves. This growth will be delivered through a significant increase in investment in marketing and new business development, combined with continued tight control of our costs.

Details of our **marketing and business development strategy** are presented in the Trust's Three-Year Financial Plan, 2005-8, which is available on request from the Head of Finance. Its key elements include:

- the reduction in our dependency on the vagaries of the day visitor market by building greater public awareness of the full diversity of our activities as the basis for a broader membership appeal. Our marketing spend will be doubled to £1.4million per annum
- the diversification of our income streams by developing a range of new business partnerships that recognise the full value of the NTS as a brand name. Inevitably these will require front-end investment, so a sum of some £850k per annum has been set aside
- the increased investment in our properties so as to enhance the quality of the experience we offer our visitors
- the need to invest in our staff through catch-up in salaries and personal development. Inevitably this will result in an increased deficit in our operational account for the first year, but this decline will be more than compensated for in the second and third years as the additional income generated by the investment in marketing and new business development comes on stream

The **targets** set out in the programme include:

- by the end of 2007/8:
 - to increase the number of paying visitors from 0.5M to 0.75M and non-paying visitors from 1.1M to 1.6M
 - to increase the membership penetration of ABC1 households in Scotland from 15% to 20%
 - to increase the conversion rate of paying visitors into members from the current 8.1% to 9.3%
 - to increase our total membership from the current 275,000 to 350,000
 - to be producing an additional £2.3M income through the development of new business opportunities
 - to grow our legacy income to deliver £4.4M income

- by the end of the financial planning period (2012):
 - to grow the level of our unrestricted reserves in the General Income Fund to the equivalent of six months normal operational activity
 - to be able to meet the capital costs for conservation, repair and improvement projects projected for the succeeding twelve month period
 - to improve the financial sustainability of the Trust's operations by generating a surplus in the General Income Fund of £0.5M by the end of five years (2008)
 - to deliver the fundraising targets set out in our Major Capital Campaign that will enable the Trust to invest in new visitor facilities and to secure the endowments necessary for us to take on new properties. The overall target is to raise around £40M over the next five years

The downside **risk** of this financial programme depends on six main factors:

- the effectiveness of the marketing strategy to deliver the forecast increase in the number of visitors to the properties
- the effectiveness of the communications strategy to broaden the appeal of the Trust to a wider audience and thereby to attract more members
- the performance at the properties in converting the increased visitor numbers into members and in meeting our commercial targets
- the effectiveness of the off-property developments to diversify our income away from dependence on the day visitor market
- the continued buoyancy in our legacy income to maintain the General Income Fund
- the success of our Major Capital Campaign to deliver the funds needed for investment in our properties

Further details about the Trust's financial plans and reporting structures are presented in Appendix 2, Financial Information.

BACKGROUND INFORMATION

1. About the Trust

We are Scotland's largest voluntary conservation organisation, with some 277,000 members and around 500 permanent staff. We promote the conservation of the whole heritage of Scotland, both natural and cultural, and directly own or manage 128 properties, including almost 76,000 hectares of countryside, making us one of Scotland's largest landowners. On behalf of the nation, we care for a great diversity of properties, including mountains, coastlines, islands, woodlands, battlefields and historic sites, gardens, castles, mansions and cottages. Each year we welcome about 1.5 million visitors to our properties where numbers are recorded, and about the same number again visit our countryside properties.

Acts of Parliament

The Trust was established in 1931 as an independent charity with powers to hold land, buildings and chattels for the benefit of the nation. Our aims were first defined in The National Trust for Scotland Order Confirmation Acts of 1935 and 1938. The 1935 Act states the general purposes of the Trust:

The National Trust for Scotland shall be established for the purposes of promoting the permanent preservation for the benefit of the nation of lands and buildings in Scotland of historic or national interest or natural beauty and also of articles and objects of historic or national interest and as regards lands for the preservation (so far as practicable) of their natural aspect and features and animal and plant life and as regards buildings for the preservation (so far as practicable) of their architectural or historic features and contents so far as of national or historic interest

These were extended in the 1938 Act to include the promotion of:

- (a) *The preservation of buildings of architectural or artistic interest and places of historic or national interest or natural beauty and the protection improvement and augmentation of the amenities of such buildings and places and their surroundings;*
- (b) *The preservation of articles and objects of any description having artistic or antiquarian interest;*
- (c) *The access to and enjoyment of such buildings places articles and objects by the public*

Although the 1935 Act uses the words 'permanent preservation', we now generally use the word 'conservation', which implies more active management and acceptance of change in relation to significant places.

Ownership, Inalienability and other Legal Powers

To date, we have used ownership as the principal means to implement these statutory purposes; acquiring and managing properties of national importance and opening many of them to the public. However we are also empowered to manage property owned by others, either in partnership or on its own. The 1935 Act enables the Trust to declare property inalienable if it is considered worthy of preservation for the benefit of the nation. Inalienable property cannot be removed from Trust ownership against our will except by prescribed parliamentary procedure. We may also enter into restrictive agreements with the owner of any property we consider worthy of preservation for the nation: these agreements impose conditions over the planning, development and use of such property.

The principles which underpin our work are expressed in our *Conservation Principles* and our *Access, Enjoyment and Education Principles*. The Trust interprets its requirement to act 'for the benefit of the nation' as inclusively as possible; we aim to benefit a wide range of people including members, visitors, tenants, donors, local communities, and people of Scottish ancestry worldwide, both present and future generations. We also aim to benefit those people who are not currently involved in the Trust's work, but whose interest could be awakened in the future.

Governance and Management

The Trust is ultimately governed by a large Council which includes both representatives elected by our members and representatives of other national bodies. The Council acts as the guarantor of the integrity of our operations and provides a forum for debate of major issues of principle. However, the main functional responsibility for the active operational management of the Trust, within the principles established by Council, rests with a small Board of both non-executive and executive directors. The Council also appoints an Audit and Risk Management Committee and a Nominations Committee. The Board appoints a Conservation Committee, Finance Committee and five committees covering the four Trust regions and London. The subsidiary National Trust for Scotland Trading Company Limited was established in 1985 to increase the Trust's income through commercial activities. The detailed implementation of the strategies and policies agreed by the Board is the responsibility of the Senior Management Team, comprising the Divisional and Regional Directors and chaired by the Chief Executive. The routine administration and management of the Trust's properties is devolved to property managers and regional staff. In addition to our permanent staff complement, we recruit over 1000 part-time seasonal staff, and are supported by a team of over 2,500 volunteers.

Funding and Support

The Trust is not a government department but a registered charity; we depend on the commitment and support of many people and organisations to carry out our work. The Trust's average annual turnover in the period 1999-2004 was £34 million. Membership subscriptions, donations and legacies are our mainstay, providing around one third of our gross annual income. Income generated from admissions to properties and commercial activities accounts for another third, with the residue coming from investment income and grants from government agencies and other bodies. We gratefully acknowledge the generous financial support of many organisations and individual donors, in particular the European Structural Funds, Heritage Lottery Fund, Historic Scotland and Scottish Natural Heritage.

Of the 128 properties in our care, only nine have adequate endowments, meaning that the vast majority do not have a large enough capital fund to finance their running costs and keep them in good conservation health over the long term. As most of the properties are held inalienably, our responsibility to care for them is over the very long term; indeed as our founding Act of Parliament says – it is *permanent*.

2. Operating Environment

Looking Back, 1999 – 2004

The last five years have seen a number of external events which had major consequences for us. Some were positive, such as legislative changes like the Land Reform Act and the Disability Discrimination Act. The latter was a welcome opportunity to make sure we encouraged as wide an audience as possible to access our properties. Other events were neither welcome nor predictable, for instance the Foot and Mouth outbreak of 2001 or the terrible event and consequences of September 11th 2001, stock market slumps, the pensions crisis and rises in insurance premiums.

Within the Trust, major reviews of the organisational structure and governance were completed while the financial health of the organisation improved dramatically. Stringent financial controls and improved commercial performance led to the reduction of our operating deficit from £2.5m in 2001 to £0.5m in 2004. The combined effect of these changes, particularly in the organisation of our governance and internal structures and the better management of our financial situation, has created a sound platform for further growth in future operations and activities. A more detailed review of our operations and performance over the last five years is given at Section 4 of this Appendix.

Looking Forward, 2005 – 2008

The current climate of war, terrorist threat and economic uncertainty implies a period of increasing unpredictability. The identification and management of risk must therefore be central to future planning. Climate change, a threat on a global scale, will also certainly cause damage to the natural and cultural heritage of Scotland. Uncertainty about oil and gas supplies is simply the sharp end of a much larger issue about energy production and consumption. Should funding to the Scottish Executive be reduced, for whatever reason, then heritage funding is likely to be an early casualty. Similarly, while the proportion of National Lottery (NL) funding ring-fenced for heritage is set to continue until 2009, thereafter there may be a re-distribution of NL resources among the good causes. In the interim, the Heritage Lottery Fund's *Strategic Plan* makes explicit its shift of emphasis to encourage smaller and more community-based projects rather than very large multi-million pound projects. Funding from non-UK governmental sources is also uncertain: the current European Union Structural Funds programmes come to an end in 2006, and priorities can then be expected to change to favour the new member countries. Compliance with UK and EU legislation, especially in the employment sector, will continue to stretch the Trust's resources. While we welcome many of the reforms as progressing employment conditions over the longer term, many do have an immediate effect of increased costs. The following paragraphs identify some key issues and trends which are likely to have a significant impact upon the Trust over the next three years.

Political Context

Excellent opportunities for us to engage with opinion-formers in the political arena will continue to emerge as the devolution settlement matures into a permanent feature of Scottish life. This will particularly apply to the Scottish Parliament, through giving evidence to Parliamentary inquiries and through influencing the legislative process, where early opportunities will include the Charities Bill and the Planning Bill. We will also continue to relate to the Scottish Executive and relevant agencies, both through policy advocacy and through seeking to develop funding partnerships for capital projects and revenue operations.

Demographic Trends and Trust support

The total population of Scotland is predicted to fall slightly to less than 4.9 million over the plan period. However 2005 – 2008 is characterised by the beginning of a major predicted population trend which will see an increase in the pensioner population and in the under sixteens, compared with those of working age. This ratio is predicted to rise from 60% in 2004 to 73% by 2023. Even if working lifespan is "stretched" by raising normal retirement age, as many expect, or immigration is encouraged to bolster the workforce, the likelihood is that a decreasing population of economically active workers will have to shoulder an increasing financial burden.

Within the growing segment of pension-age population, there is a noted polarisation between those who are comfortably off and those who will be living in near poverty. The richest 20% of pensioners have seen their income

rise by 68% in the last 16 years, while the poorest 20% have experienced only an 11% growth in income over the same period. Currently the largest and most stable segment of our membership are the better-off over-55s and they also comprise the members most likely to become donors or legatees and make up a large proportion of our visitors. Demographically, this sector appears to have a future outlook of continued financial stability – at least over the medium term. While this sector offers us the opportunity to grow our support, we need also to be aware of the potential that other market segments could offer us as supporters. Indeed as a charity dedicated to the concept of “benefit of the nation” it is our responsibility to diversify our engagement with all sectors of the population.

Visitor Market and Demands

Competition for peoples’ leisure time and money has never been so fierce; the 1990s saw an eightfold rise in the number of visitor attractions, while the number of potential customers remained static. Nor have consumer expectations ever been higher, and this trend is set to continue. A multitude of malls and speciality shopping outlets, garden, craft and visitor centres and theme parks will compete with traditional “heritage” visitor attractions for a finite audience. The market is becoming more diverse in its demands, seeking many different experiences and with the financial power to choose exactly what appeals in the moment; this could be fast food one day and gourmet dining the next. One growing trend identified by research is demand for experiences which offer self-improvement, spiritual fulfilment (in its broadest sense) or life enhancing “quality time” to counterbalance the pressures and stresses of everyday life.

Environmental Issues and Sustainability

Global over-consumption of natural resources will continue to have negative impacts upon the environment. Rising demand for goods and materials requires increasing levels of energy to be used in production and transport. All businesses must comply with environmental legislation, but our status as a conservation charity generates public expectation that we will demonstrate high standards of environmental practice beyond legal requirements. These must include waste minimisation and reductions in the use of non-renewable resources. The development of corporate social responsibility practice is likely to extend expectations well beyond environmental issues into social and ethical ones.

Implementation of the Kyoto protocol will continue to drive international efforts to combat climate change resulting from carbon emissions. This generates opportunities to demonstrate our support for this agenda, and also requires us to address the effects of climate change upon our properties. The predicted changes in Scottish climate have implications for the Trust in our roles as both property owner and conservation body. All our properties are likely to be affected to some degree. Risk of structural damage will increase due to more severe storms, flooding will damage habitats in vulnerable areas, landscapes will undergo ecological change and key mountain species will be threatened by temperatures rising faster than species and habitats can adjust. The most visible Scottish response to the climate change agenda will be the further development of onshore wind farms, followed by offshore wind, tidal and wave power and associated transmission lines. It will be essential for us to demonstrate clear policy responses to these issues.

The end of the era of cheap road and air transport is imminent as we approach ‘Peak Oil’1, the point at which oil extraction rates outstrip new discoveries. We will therefore need to examine alternative business models to that of visitor attractions which depend on car-borne visitors, and will need to demonstrate our clear support for walking, cycling and public transport.

Trends in the Heritage sector

While government bodies and other funding agencies will continue to fund and support heritage causes it is clear that they increasingly wish to see a demonstrable benefit to people flowing from their investment in heritage. The public too, through such programmes as BBC TV’s Restoration or more directly through consultation on planning issues, want a say in what counts as heritage and how it should be treated. Viewing heritage in its wider context as an economic resource and as a driver for social cohesion, community benefit and improved quality of life is now a prerequisite to gaining support for projects. These values have a long history within the Trust such the Little Houses Improvement Scheme’s partnership with local housing associations and the desire to develop sustainable island communities on Canna and Fair Isle or crofting communities at Balmacara. Understanding how to communicate these additional values, how to measure the benefits and make the case for heritage on these grounds will be key to our success in attracting support in future years.

In a Scottish context one of the key conservation debates over the next few years is likely to be how the Scottish landscape is valued and managed. Development pressure based on economic opportunities, from wind farms to urban fringe trading estates, will force the agenda. It will not be enough to base the heritage case on aesthetics or conservation issues alone: economics, environmental, social and community interests will also require consideration, and to make the case we must learn new skills and new tactics.

3. About This Corporate Plan

Introduction

This Corporate Plan describes the approaches we are taking to fulfil our core purposes of promoting the conservation of and access to Scotland's heritage places for the benefit of the nation. The plan divides into two parts:

- i. the **Strategic Plan** which has a three-year life span and sets out broad aims and objectives, stating the progress we need to make over the next three years to fulfil our Mission and work towards our long term Vision (see page 3). It explains why we need to make progress on these particular issues and indicates broadly how we will move forward by listing Priority Initiatives. These Strategic Aims, Objectives and Initiatives are set out in the Strategic Plan, pages 6-10.
- ii. the **Annual Implementation Plan** sets out the "how" and "how much" of the Strategic Plan we will put into practice over a single financial year. How much work we can achieve is limited by resources, both financial and human, and by external factors, many of which may be beyond our control. Though this plan is updated annually, its purpose is always to serve the interests of the Strategic Plan and to provide a method via the **Annual Report** for reporting progress of the Strategic Objectives against the targets set out at the beginning of each year. The Annual Implementation Plan is a separately bound document and is available on request from the Policy Department.

How was this Corporate Plan developed and how will it be delivered?

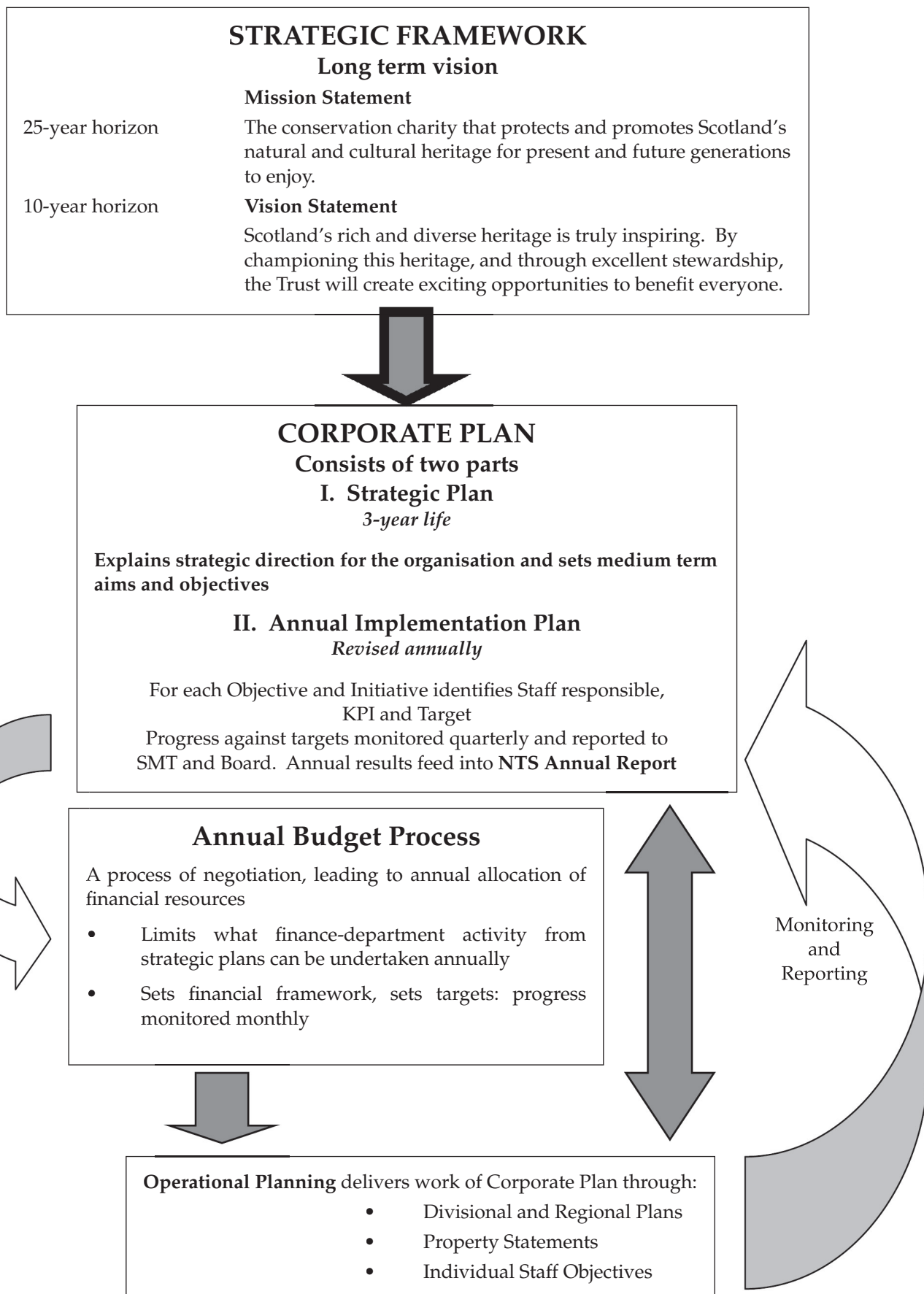
The Strategic Plan was developed through a participative process to which many staff contributed and in consultation with our Committees. It has been drafted by a staff team working to the Chief Executive and in close consultation with the Board and Senior Management Team (SMT). The plan will be delivered through the Annual Implementation Plan, which drives the various levels of operational planning in the Trust from regional plans to property statements and individual staff workplans. The parameters for the Annual Implementation Plan are set according to the resources available for its delivery. This happens by two major negotiating processes: the **Budgeting Process** which allocates financial resources; and **Operational Planning**, which assesses the human resource capacity to successfully deliver our objectives. The diagram on page 19 represents how the Corporate Plan fits in to our wider planning structure. This is a much-simplified representation and concentrates on the strategic part of our planning system. It is represented, for diagrammatic ease, as a top-down process, though the reality is that it is a cyclical and iterative process based on negotiation.

How will the Corporate Plan be monitored and reported on?

The Trust's Board approves the Corporate Plan and they are responsible for ensuring it is carried out. The Trust's SMT are responsible for monitoring progress through their monthly reporting system and for reporting results to the Board at regular intervals. The Annual Report is the means by which the Board report progress to Council, to our membership and to the public.

The main mechanism for measuring progress is therefore through the Annual Implementation Plan which will identify senior staff responsible for each Objective and set KPIs and targets, budget and resources required. These targets will be set in negotiation with the key people involved.

NTS Strategic Planning Structure



4. Review of 1999-2004

This section summarises the main results and outputs generated by the previous Corporate Plan and other events: it was a period of extraordinary change for the organisation.

Conservation

Council approved 12 Conservation Principles, which jointly set out the fundamental philosophical approach behind all of our work. We developed our Acquisition Policy, supplemented with an Evaluation of Heritage Significance methodology; together these set out a rigorous process and criteria for future acquisitions. We published policies on Collections Care, Deer Management, Farmland Management, Renewable Energy Developments and Wild Land.

We opened two major new properties: the Museum of Scottish Country Life at Kittochside near East Kilbride, in partnership with the National Museums of Scotland, and Newhailes, an 18th century villa on the outskirts of Edinburgh, following an innovative conservation programme. St Edward's Church on Canna and the Dolphin House at Culzean were both converted into residential accommodation for visiting educational groups. The A-listed Dymock's Building in Bo'ness was converted into 8 flats for community use under the Little Houses Improvement Scheme. Threave House in Galloway opened to the public with many original contents following many years' use as student accommodation. A £9m programme of repair to 50 buildings on Culzean Estate in Ayrshire was completed after 10 years.

Black grouse numbers increased at Mar Lodge Estate as did corncrake numbers on Iona, Canna, Pabbay and Fair Isle, and the first sea eagle chick was reared on Canna. A major initiative to repair upland paths across the Trust was launched as *Scotland's Mountain Heritage*, and the Ben Lawers Historic Landscape Project started researching the rich historic environment of that mountain property.

We acquired three major new properties: the islands of Mingulay, Pabbay and Berneray in the Outer Hebrides; Crarae Garden in Argyll; and Urquhart Castle on Loch Ness, which was bequeathed to the Trust but continues to be managed by Historic Scotland. We acquired two smaller properties in Edinburgh: 14 Ramsay Garden in the Old Town, home of polymath planner Sir Patrick Geddes; and Bella Vista in the village of Duddingston. We took over management, but not ownership, of the David Livingstone Centre near Blantyre, which commemorates the life of this great African explorer and presents his birthplace. We participated in discussions over the future of the Black Cuillin and Dunvegan Castle on Skye, Dumfries House in Ayrshire and Abbotsford, the Borders home of Sir Walter Scott.

Access, Enjoyment and Education

Annual recorded visitor numbers to Trust properties which charge for admission declined gradually from about 1.8 million to 1.6 million, but fell below 1.5 million in 2001 due to the Foot and Mouth Disease outbreak. The resultant closure of large parts of the Scottish countryside had devastating effects upon rural economies dependent upon tourism and agriculture, and upon the Trust's own operations; however, the Trust led the development of the *Comeback Code* which encouraged visitors to return to the countryside whilst taking appropriate precautions. Initial monitoring work on free visits to open countryside properties indicates that there are at least as many countryside visitors as visits to the Trust's paying visitor attractions.

A number of long-term projects aimed at improving visitor facilities finally reached fruition. The new environmentally designed Glencoe Visitor Centre opened after 11 years of planning, development and construction. We opened a museum dedicated to geologist and author Hugh Miller in Miller House, adjacent to his birthplace in Cromarty, and recreated sculptor Hew Lorimer's studio at Kellie Castle in Fife. All staff received customer care training, aimed at giving the warmest possible welcome to visitors. The Trust's education work continued to develop, particularly through a network of regional education officers supported by the Heritage Lottery Fund.

Following a thorough review, a Head of Volunteering was appointed to develop this crucial aspect of our work. In addition to the opportunities for voluntary practical work already provided by Thistle Camps and Conservation Volunteers, we established Corporate Challenge team-building projects for companies and Trailblazer camps for 16- and 17-year-olds, which combine practical conservation work with outdoor adventure. An improved website was launched, and subsidiary sites developed for several aspects of our work including education and fundraising.

Influence and Reputation

Membership of the Trust grew by 16% from 236,000 to 275,000 as a result of efforts put into recruitment and retention. The Trust celebrated its 70th Anniversary in 2001, publishing its history *For the Benefit of the Nation*. The Trust received awards from for its work at Newhailes, Glencoe and Charlotte Square from a number of bodies including Europa Nostra and the Royal Incorporation of British Architects. We hosted the 10th International Conference of National Trusts in Edinburgh in 2003.

The creation of the Scottish Parliament through devolution in 1999 created unprecedented opportunities for political advocacy. The Trust engaged fully in debates over much legislation affecting its work, including the Abolition of Feudal Tenure Act, National Parks Act, Title Conditions Act and Agricultural Holdings Act, and gave evidence based on its experience to Parliamentary Inquiries into Rural Development and Renewable Energy. The Land Reform Act provided the greatest opportunity in the Trust's history to promote its statutory purpose of public access, and so required unprecedented levels of involvement in the political process and in formulating the Trust's practical responses to its provisions. Much of this campaigning work was carried out in partnership with Scottish Environment Link and Built Environment Forum Scotland.

The Trust welcomed the strong planning powers allocated to the Loch Lomond and the Trossachs National Park, and campaigned unsuccessfully for similar powers for the Cairngorms National Park as well as for the inclusion of north Perthshire within its boundaries. We also campaigned successfully for the safeguarding of wild land in Wester Ross, when the proposed Shildaig Hydro Scheme was finally rejected after a nine-year struggle.

Organisation and Resources

Three major reviews took place. The 1999 Working Practices Review cut the number of Regions from 6 to 4, but strengthened the new Regions with integrated teams of conservation specialists. The 2002 Organisational Review comprehensively tackled the Trust's structure, operations and finances, creating the merged Conservation and Property Services Division at Head Office. The 2003 Governance Review delegated much of the governing Council's functional responsibility to a new 13-person Board, and added three new Committees: Conservation; Nominations; and Audit and Risk Management.

The Trust's financial year-end shifted from October to February in 2001, resulting in one 16-month accounting period. Turnover fluctuated between £30m and £39m, but critically the annual deficit on the operating account was gradually reduced from £2.5m in 2001 to £0.5m in 2004, through strict budgeting and tight controls on expenditure. The net contribution from commercial operations such as hospitality, catering and retail rose steadily from £0.8m in 1998-1999 to £1.4m in 2003-2004. The Trust entered a formal recognition agreement with trade union Prospect, which now collectively negotiates pay and terms and conditions of employment on behalf of all Trust staff.

Scottish Natural Heritage, through the ongoing *Concordat* agreement, helped to fund a range of countryside management activities including ranger services, habitat and species conservation programmes, footpath work and education projects. Historic Scotland, under the Annual Maintenance Grant, supported the repair of most listed buildings owned by the Trust and also funded 5 surveyor posts to help complete outstanding programmes of work.

In 1999 the Trust moved into its new Head Office in six repaired and converted Georgian town houses in Charlotte Square, Edinburgh. We were saddened by the deaths both of our Patron, Queen Elizabeth the Queen Mother, and of our former Director and Vice-President Emeritus Sir Jamie Stormonth Darling. Our Director Trevor Croft left and Deputy Director Duncan Cameron retired. Change took place in all of our senior offices: new Chairman Roger Wheeler in 2000; new Chief Executive Robin Pellew in 2001; new President the Earl of Dalkeith in 2002; and new Patron Prince Charles, also in 2002.

5. Glossary

Action	Specific activity or tactic to be carried out in the short term which contributes towards delivering a Priority Initiative.
Key Performance Indicator (KPI)	One key aspect of performance of the <i>strategic objective</i> which can be measured to indicate success. See also Box 1 below, which gives examples of types of indicators.
Key Result Area (KRA)	These define the main areas of activity for the organisation and are also known as the “four Headings”. The Trust has four <i>KRAs</i> : Conservation; Access, Enjoyment and Education; Influence and Reputation; Organisation and Resources. The Corporate Plan and other Trust planning documents are structured according to these <i>KRAs</i> .
Mission	Defines what the organisation is and what it does, directly deriving from its <i>purpose</i> .
Outcome	See Box 1 below.
Output	See Box 1 below.
Purposes	The organisation’s <i>purposes</i> define why the organisation exists; it leads directly to the <i>Mission Statement</i> . The Trust is lucky in having its purposes clearly identified in its Acts of Parliament and the exact wording is given at page 13. The Trust’s <i>purposes</i> can be paraphrased as being <i>to promote the permanent preservation of Scotland’s natural and cultural heritage, for the benefit of the nation</i> . Everything the Trust does should support these <i>purposes</i> .
Rationale	The <i>rationale</i> sets out the reasons why a particular strategic direction is being taken; it establishes why it is necessary, expands a little on how success will be achieved and points up potential pitfalls.
Strategic Aim	Overall statement of what the organisation wants to achieve within a <i>Key Result Area</i> over the medium term. It does not have to say how we’ll do it (strategy and tactics) nor why we need to do it (<i>rationale</i>) – it just sets out the goal.
Strategic Objective	Top level objective which it is critical for the Trust to progress if it is to achieve its <i>Strategic Aims</i> .
Strategy	A <i>strategy</i> sets out the general direction, method and logic which together move the Trust towards achieving its stated aims and objectives, for a specific activity, over approximately a three-year timeframe. Strategies need to be strong on <i>rationale</i> so people are clear why the organisation needs to move in a particular direction, and they also need to relate to and complement each other so the organisation is not pulled in different directions towards aims which are in conflict. The Corporate Plan is the mechanism by which strategies are made to relate.
Tactics	<i>Tactics</i> are the means you identify to help you put a strategy into practice “right here, right now”, making the best use of the resources you have available. <i>Tactics</i> are at the “sharp end” of strategy, they are about progressing Priority Initiatives and <i>actions</i> over the short term and they need to be reviewed and revised frequently, depending on results.
Target	The level of progress desired, by the end of the year, for each <i>Strategic Objective</i> or Priority Initiative. Targets should only be set with the willing agreement of those charged with their delivery.

Values	<i>Values</i> define how the Trust works, its ethos and culture, rather than what it does. Values should be evident in the day to day working of the organisation and should be a “constant factor”.
Vision	The <i>Vision</i> sets the 10-year aspirational goal for the organisation; it is about what we want to achieve and where we want to be in about 10 years time.

Box 1. Types of KPI

Input	The resources (money, time or people) committed to an activity, usually a quantitative measure, e.g. resources committed to improve visitor facilities and welcome.
Output	What actually gets done/produced or delivered with the Input; usually a quantitative measure, e.g. new visitor infrastructure installed; hours of Customer Care training delivered.
Outcome	The difference made by an activity. Outcome indicators are usually qualitative and are notoriously difficult to identify and often contain elements which are outside the organisations control, but they are the only measure which actually tries to answer the questions - <i>has it achieved the desired effect – has it worked</i> , e.g. Visitor Satisfaction Survey.

FINANCIAL INFORMATION

1. Introduction to the Trust's Accounts

The Trust is legally obliged when publishing its annual accounts to combine all of its income and expenditure into a single statement. However, this can give a misleading picture of the Trust's financial status, because the inclusion of large single one-off items of income or expenditure can skew understanding of the underlying trends. For internal management purposes the Trust therefore records, monitors and controls its accounts under two separate headings, the operating account and the capital account.

The operating account covers all routine ongoing elements of income and expenditure, including:

Income	Expenditure
Membership subscriptions	Salaries and wages (for Properties, Regional Offices and Central Office)
Property admissions	Maintenance and equipment
Net results from commercial operations (including retail, catering, holidays, plant sales and hospitality)	Insurance
Revenue grants	Utilities
Rents	Marketing and publications
Investment income from property endowments and reserves	Professional fees
Minor donations	Travel and subsistence
	Overheads

The capital account covers major one-off items of income and expenditure, including:

Income	Expenditure
Capital grants	Major capital repairs, improvements and developments
Endowment grants	Property acquisitions
Investment income from restricted and designated funds	
Major donations from individuals, companies and charitable Trusts	
Legacies	
Asset sales	

The Trust's Funds

The Trust also separates the funds it holds into three headings for internal management purposes: restricted funds, designated funds and the General Income Fund. Donations, bequests and legacies given to the Trust for specific purposes are invested in 'restricted funds' whose income or capital is only used for that purpose. Donations, bequests and legacies given to the Trust with no conditions attached are also sometimes also invested, on the advice of the Finance Committee, in 'designated funds' whose income or capital is only used for a specified purpose.

The remaining General Income Fund (GIF) therefore holds the Trust's only true free funds, which the Board can decide to allocate to whichever of the Trust's purposes it considers most appropriate at the time.

2. Financial Information

The three figures which follow to provide a greater insight into the Trust's financial plans, fuller details are available in the Trust's Financial Plan 2005 – 2008. Annual financial allocations to support the Strategic Objectives and Priority Initiatives set out in the Corporate Plan are presented in the Annual Implementation Plan, which is available on request

Figures 1a and 1b show the baseline information on the sources of our income and the allocation of expenditure for financial year 2005 - 2006 for our operating account – this covers just routine conservation planning and management, property maintenance, and operating overheads.

Figure 1a
Operating Account
Budget 2005-2006
Income

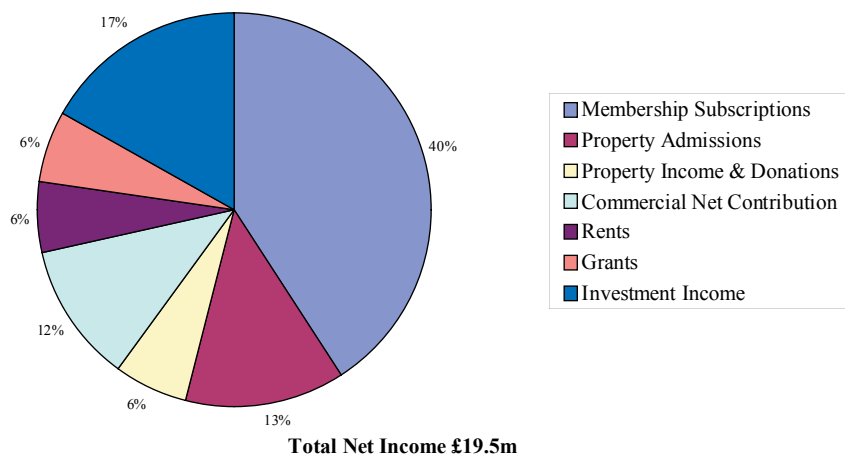
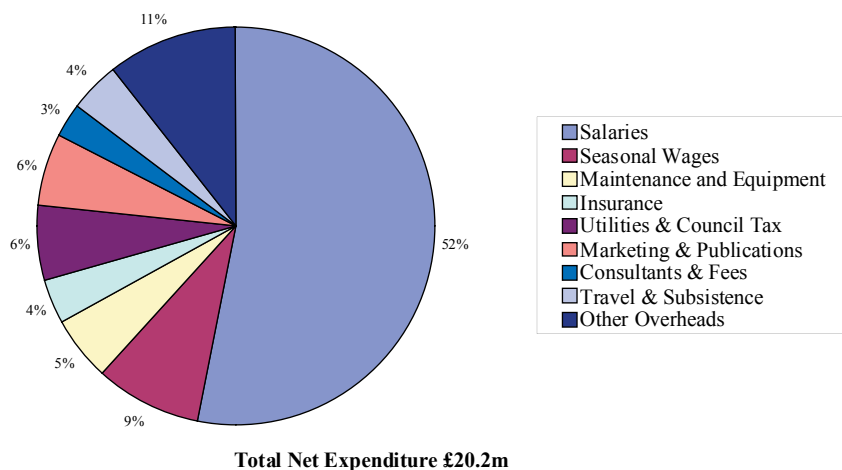


Figure 1b
Operating Account
Budget 2005-2006
Expenditure



Figures 2a and 2b show the projected trends in the main elements of our operating income and expenditure over the five-year period, 2003 – 2008. The main growth areas are the further expansion of our membership from the current level of 275,000 arising from the increased investment in marketing, and the net contribution from our commercial activities with the investment in new business development. The growth in salaries and wages arises primarily from the catch-up on salaries against our benchmarks rather than any significant increase in the staff complement.

Figure 2a
Operating Account
Forecast 2003-2008
Income

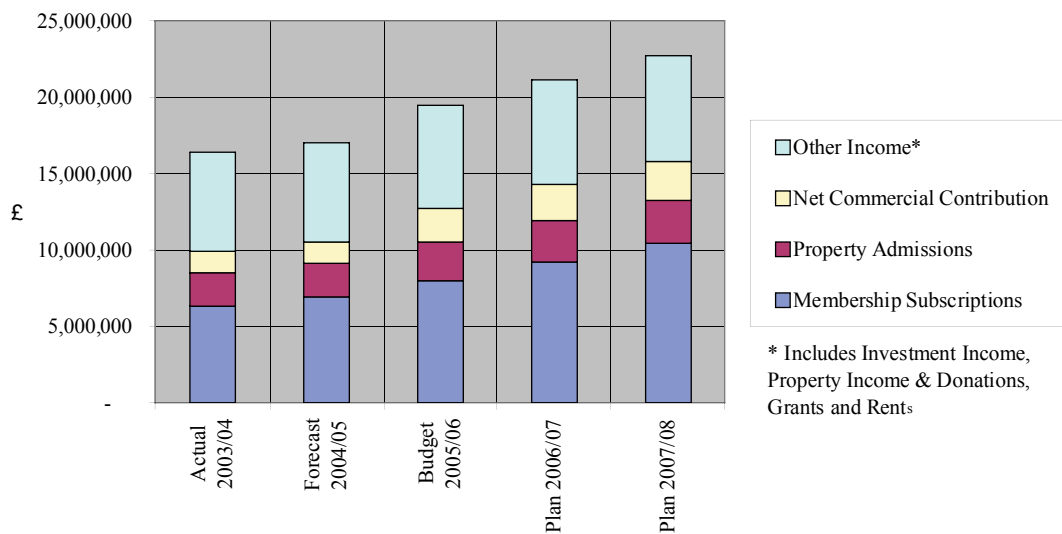


Figure 2b
Operating Account
Forecast 2003-2008
Expenditure

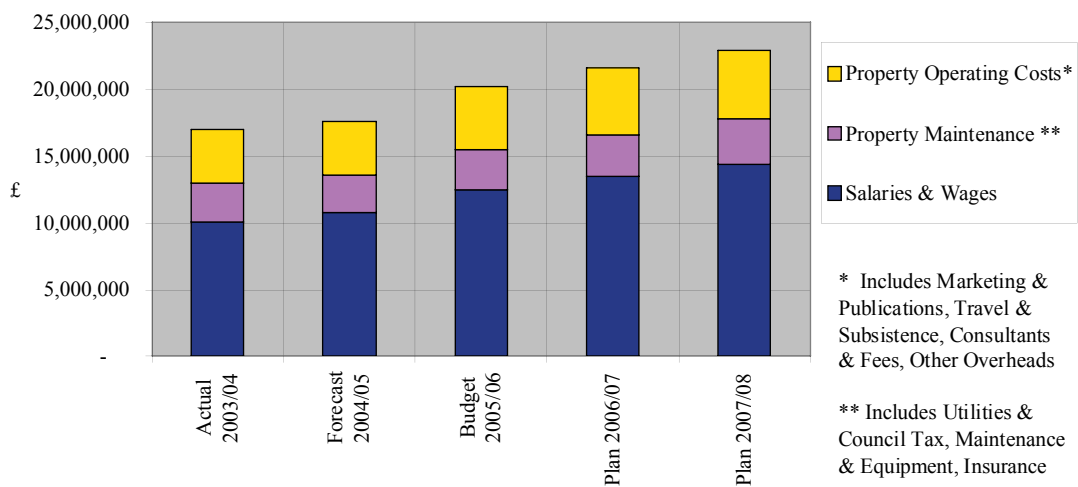


Figure 3 shows the forecast changes in the Trust's unrestricted income (the General Income Fund) over the three years, 2005 – 2008, which is projected to show a strong performance as the returns on the increased investment begin to flow

Changes in the General Income Fund,

2003/8

Budget 2005/06

	Annual 2003/04 Actual £000	Annual 2004/05 Forecast £000	Annual 2005/06 Budget £000	Annual 2006/07 Plan £000	Annual 2007/08 Plan £000
Operating Results					
Net Operating Result Total	(528)	(590)	(30)	834	1,979
Transfers between Funds					
To Restricted Funds	(1,524)	(897)	(1,102)	(1,190)	(1,285)
Management Charges	1692	1600	1,886	1,999	2,119
Recruitment and Visit Credits	(1,007)	(1,100)	(1,369)	(1,533)	(1,717)
	(839)	(397)	(585)	(724)	(884)
Capital Receipts					
Unrestricted Legacies	2544	3300	3,300	3,300	3,300
Major Gifts		150	200	200	200
Asset Sales	200	0	0	0	0
Available for Funding	1,377	2,463	2,885	3,610	4,595
Funding Requirements					
Capital Project Funding	816	1899	1,520	1,780	2,050
Property Maintenance	525	550	550	550	550
New Business Investment	0	0	700	720	750
Total Requirement	1,341	2,449	2,770	3,050	3,350
Net Increase/(Decrease) in Funds	36	14	115	560	1,245

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