



## The National Trust for Scotland

### Countryside Management Strategy 2002-2005

#### **BACKGROUND**

The National Trust for Scotland operates countryside management services at its Head Office and across its four regions. The activities of countryside staff have been co-ordinated through preparation of work plans, local strategies, Corporate Plans and Property Management Plans. A draft Countryside Strategy was prepared in 1998 as input to the Corporate Plan 1999-2004 and in 2001 operational plans were produced for the Countryside Division and by Regional Countryside Managers.

This strategy draws from earlier documents and is built firmly on the principles of the Concordat entered into by The National Trust for Scotland (NTS or the Trust) and Scottish Natural Heritage (SNH) in January 1999. This document defines in broad terms the mutual interests, aims and objectives of the two organisations and describes how they will work in partnership to develop these joint purposes. The funding for the Trust's Ranger Service by SNH was encompassed under the Concordat arrangements from 1 November 1998, with a National Ranger Grant supporting all Trust services bar Mar Lodge Estate, which continued to be funded via the property Management Agreement.

During the period November 1998-February 2002 [the Trust changed its financial year from November- October to March-February] ranger service work planning was guided at two levels: at the national level by the Ranger Strategy 1998-2003, and at the service level by individual ranger service strategies and/or work plans. Similarly performance was monitored via individual ranger service six-month and annual reports, and via the national Countryside Annual Report.

In addition to the Ranger National Grant, SNH has provided grant aid on a more ad hoc basis to support capital projects and other works. Such grants have been agreed on an individual basis and while they assist in implementing the Concordat there is no strategic link between such grants and the Concordat.

#### **INTRODUCTION**

The Ranger Strategy is of five-year duration, while the Ranger National Grant was a three-year grant offer, and it was planned that the Strategy be reviewed in year 3. Whereas in general terms the funding and planning/reporting arrangements have worked well, it is still felt mutually that the detail of individual work planning and recording is unnecessarily onerous. More recently both parties have felt that the funding programme from SNH to the Trust could be more efficiently delivered if other grant assistance could be handled under one grant offer embracing all aspects of countryside management (including designed landscapes/gardens for which SNH has a statutory remit) that fall within the parameters of the Concordat.

**The intention at this break point in the Ranger Strategy and the funding arrangements for the Trust Ranger Service is to broaden out the scope of strategic planning and funding to reflect wider and more holistic countryside management. This will ensure greater commitment to**

**delivery of the breadth of the Concordat.** It will also, through the development of key performance targets, reduce the administrative burden to both parties, whether in time-planning and recording, or in handling the many small grant applications which can now be absorbed under one national grant.

**Countryside Management** seeks to conserve and enhance natural and cultural heritage features in the countryside for the enjoyment and appreciation of visitors. It includes on the one hand the delivery of practical habitat, species and cultural site management and on the other the provision of visitor facilities and support services, including environmental education and interpretation.

Countryside management is delivered across the Trust by a co-operative of permanent, seasonal and volunteer staff based at the properties, the regions and within Head Office. Whilst in theory property staff are wholly responsible for delivery on the ground, with regional colleagues supporting and directing this function and Head Office developing policy and work standards, in practice the 83 permanent and 30 seasonal Trust staff involved in countryside management operate beyond any such rigid boundaries.

They do so by working to clearly agreed targets or work plans developed within broader strategies. At the property level priorities are expressed and rationalised within Property Statements (mini Management Plans); a number of ranger services have amalgamated property work into area Ranger Strategies. Regional priorities are laid out in Regional Countryside Management Strategies with this national strategy being both a summation of regional and property intentions and also laying out national priorities for the medium term.

There are not only clear linkages between this strategy, the 4 regional ones and the property plans, but there is, or will be, precise articulation between countryside work planning and the strategies in other, related disciplines. For instance, there is already close co-operation and consistency between countryside and education strategic thinking.

**This strategy will therefore guide the work of Trust countryside staff over the next 3 years and link directly to those being developed in other sectoral areas of the Trust.** Whilst not excluding the development of other areas of activity, and indeed flexibility of delivery will be encouraged, it will ensure that the energies of staff and volunteers are focussed on the priorities that are identified. It will form the basis of and the justification for the support of Scottish Natural Heritage to the Trust under the joint Concordat.

## THE TRUST ENVIRONMENT

The period of the existing Concordat/Ranger Strategy has seen considerable change within the Trust. Escalating management costs have had to be met in the face of falling visitor numbers. There was also a desire for the Trust to become more devolved. As a result a Working Practices Review (WPR) was carried out in 1999 and this has had a number of consequences:

- a. A reduction in the number of regions from six to four.
- b. A greater responsibility on the regions to deliver management of the properties.
- c. The establishment of Regional Conservation Teams, each one led by a Conservation Manager and including a Regional Countryside Manager; some also have an Archaeologist and a Nature Conservation Adviser.
- d. The loss of Regional Factors and the Head Office Countryside Adviser.
- e. Appointment of new post, Head of Land Agency, at Head Office.
- f. The establishment of a Management Board (Head Office and Regional Directors) to co-ordinate activity more effectively.

Subsequent to WPR, the Management Board and Executive Committee has identified a "Path to Break Even" and seven "Immediate Strategic Priorities" for 2001. These have included an urgent programme of Property Statements development (to replace preparation of full Management Plans for most properties) and a number of visitor/marketing reviews of key properties. The Trust is also now embarking on a further Organisational Review and Governance Review. Both of these can be expected to result in changes to structure and organisation in 2002. Part of the process should also result in clear statements of corporate direction and organisational goals.

In order to make best use of the staff and volunteer resource, the Trust is developing a programme for valuing, investing and involving people. Directors have been charged with developing operational plans for their disciplines or region. As part of this programme, regional Countryside Managers have been drafting countryside management strategies.

In synopsis, the Trust has undergone considerable change in the recent past and it is likely that this will continue for some time. The Trust continues to operate within a deficit budget, making forward planning uncertain, but more important. Such plans will need to identify key outputs while also permitting a degree of flexibility to take advantage of appropriate opportunities as they arise.

## STRATEGIC ISSUES

A range of current issues will continue to influence and shape the work of the Trust's countryside management service. These include:

- a. Trends in Leisure Activity and Visitor Numbers: Over the last few years tourism and property visitor numbers have gradually declined; on the other hand the recent foot and mouth outbreak has demonstrated the continuing high level of demand from walkers and climbers for access to the countryside. The Trust will wish to optimise visitor enjoyment of its properties, whilst not undermining the special qualities of the places. This will require careful monitoring, planning and management.
- b. Access legislation: The Land Reform Bill, containing proposals to change the legislation on access within Scotland, is anticipated to be enacted within the first year of this strategy. Whilst the precise detail of the legislation is still being discussed, it will probably include the establishment of Local Access Fora and of Core Path Networks. With its wide experience in these areas, and the recent positive experience of managing access during the foot and mouth crisis, Trust staff are well placed to contribute meaningfully to these processes. Its staff will also have a clear role in promoting the associated Scottish Outdoor Access Code.
- c. Sustainable Development: The Trust supports efforts to ensure that visitors can access the heritage and at the same time contribute to both the economies of local communities and of the Trust. As part of a minimal impact ethos, the Trust encourages the use of sustainable transport to reach properties and will continue to promote the range of available opportunities.
- d. Working with Communities: Whilst mindful of the Scottish Executive's emphasis on the important role of local communities in decision making, the Trust must have regard for the many communities of interest wishing to have a voice and be heard in the decision-making process. The Trust must ensure that it works in genuine partnership with an array of interests. Local communities must be encouraged to participate in the work of the Trust, and the Trust must be responsive to their needs. "Urban fringe" properties will have a particular role to play in this regard.
- e. Social Inclusion: The Trust is firmly committed to ensuring that people of all backgrounds and abilities can enjoy the places in its care. With the Disability Discrimination Act coming into "full force" during the period of this strategy, staff will review services and facilities and achieve compliance with the law. Special consideration will need to be given at those wilder properties where the Unna Principles apply.
- f. Learning for Life: The Trust has already signed up to the principle of life long learning and will continue to develop a range of educational opportunities for the visitors to its properties.
- g. Adventure Activities Licensing/Children's Act: The Trust's countryside management service is committed to offering appropriate outdoor educational and volunteering opportunities to younger people. In doing so it will ensure that staff operate within the relevant legal framework and guidelines and be a standard bearer in this area of work.

- h. Health and Safety: Staff will continue to operate within the legislation, overseen by the Trust's Health and Safety Adviser. It is important that standards do not slip in this area, for instance in relation to Lone Working or Risk Assessments where guiding others; further thought and action may be required in this area.
- i. National Parks: The Trust has significant properties within the two proposed National Parks: Ben Lomond and Mar Lodge Estate. The Trust should use the experience already developed on these two upland estates to influence and shape those areas of National Park activity where the Trust can demonstrate expertise. This might include standards of path repair and track removal, habitat management or restoration and general approaches to landscape and wild land enhancement.
- j. National Nature Reserves: SNH has recently reviewed the functions of NNRs, concluding that not only should nature conservation have primacy in land management, but that visitors should be encouraged to enjoy these special places and their wildlife. The Trust owns all or part of seven NNRs and aims to add further sites to the list. The redefinition of NNR function matches the Trust Charter; so the Trust is ideally placed to develop best practice in NNR management with SNH and other partners.
- k. Landscape: SNH has, on behalf of the Scottish Executive, been reviewing the effectiveness of landscape protection in Scotland, particularly via the suite of National Scenic Areas. There has also been consideration of the protection of wildness or wild land, as a character of some landscapes. The Trust is well placed to contribute significantly to these considerations as it is one of the few conservation organisations to include landscape ("natural beauty") in its primary objectives. With its broad remit, the Trust is equally involved in the protection of historical, cultural and designed landscapes. The Trust has a significant role to play in evolving discussions on the relationships between wildness, cultural and natural aspects of landscape.
- l. Historic/Archaeological Features: The Trust has an important role at its own properties and at a broader policy level to protect, manage and promote understanding of the historic landscape, including individual monuments and their context. The growing awareness of such features and their contribution to understanding and enjoyment of the countryside is a theme the Trust will wish to develop.
- m. Upland Pathwork: The Trust has taken a leading role in developing the skills of managing path networks in the uplands. The recent establishment by SNH of the Upland Path Advisory Group will enhance opportunities for sharing best practice among the broad upland pathwork community in Scotland, and the Trust will be a committed partner in the group.
- n. Natura 2000: The numerous Special Areas of Conservation and Special Protection Areas designated on NTS properties lay additional responsibilities on the Trust to help fulfil government obligations in the management of these special places. Relevant countryside management staff will continue to assist with monitoring and management to ensure favourable conservation status is maintained at these sites.
- o. Biodiversity Action: The Trust has already responded positively to the Biodiversity Challenge. It leads on three Species Action Plans, has participated in the development of many Local Biodiversity Action Plans, and has incorporated elements of relevant Habitat and Species Action Plans into its own property management plans. Practical management, monitoring and interpretation will continue to target identified species and habitats.

- p. Agri-environment schemes: The reform of the Common Agricultural Policy and launch of the Rural Stewardship Scheme presents significant opportunities for conservation management of NTS farmland, both that managed in hand and let under agricultural or crofting tenancies. The Trust has developed its own farmland policy and is seeking to incorporate environmental conditions when opportunities arise to renegotiate leases.
- q. The Coastal and Marine Environment: The Trust is a major coastal landowner and participates actively in the Scottish Coastal Forum and other local Coastal Zone Management projects, including the St Abbs and Eyemouth Voluntary Marine Reserve. The development of new marine management measures under SACs, SPAs, Regulating Orders and, in due course, the Water Framework Directive, offers significant opportunities to ensure that environmental considerations are built in. The Trust seeks to influence these for the benefit of the species and ecosystems on its properties and the adjacent seas.
- r. Events: The Trust will continue to respond to, and contribute to, themed events as they arise. This may include regular weeks or days, eg World Oceans Day, or one-off events, such as Treefest or International Year of the Mountain in 2002.
- s. Climate Change: There is general acceptance that global "warming" and climate change will affect, perhaps significantly, the conservation work of the Trust, whether it be to deal with rising sea levels, increasing minimum temperatures in the uplands or greater frequency of sudden and severe precipitation and consequent impacts on buildings, paths and other artefacts. Monitoring change and developing appropriate responses will be considered.
- t. Conservation Burdens/Conservation Agreements: Once the final timetable for Land Reform legislation, and the content in relation to Conservation Burdens is known, the Trust will need to address the resourcing required to achieve conversion of existing rights such as feudal superiorities, to CB's; part of this work will include possible extinguishment of "low conservation value" rights. A project management basis for putting in place the regime agreed for monitoring existing, and implementation of new CA's, will be managed by the Senior Land Agent.
- u. Advocacy: The Trust plays an active role in promoting good practice and in seeking the implementation of appropriate public policies. In undertaking this role the Trust works closely with other organisations, particularly under the umbrella of Scottish Environment LINK, of which it is an active member.

## STRATEGIC PRIORITIES

These have been developed following discussion with key staff and by reference to:

1. The Corporate Plan 1999-2004.
2. The Draft Countryside Division Operational Plan, September 2001.
3. The four draft regional Countryside Management Strategies, September/October 2001.

Strategic Priorities are laid out under the four headings of the Corporate Plan, though many key tasks will cover more than one heading.

### Conservation

*"The Trust aims to improve the conservation work at its properties and to develop the principles that underpin this work."*

- a. Survey and Monitoring: It is recognised that many properties have an inadequate level of base-line survey to inform conservation activity; there is also inadequate monitoring of change at some properties - the Conservation Agreements have been particularly identified in that regard. With limited resources it is essential that staff time should be focussed on clearly rationalised priorities, and volunteer input harnessed. Nature Conservation, Archaeological and Visitor Management Strategies should identify national and regional priorities for survey, surveillance and monitoring, and individual monitoring strategies prepared for key properties.
- b. Policy: Countryside management operates within a framework of nationally agreed policy and principles. The immediate priorities for the Trust are to complete statements on Property Acquisition and Conservation Principles. Countryside priorities include a policy statement on wild land and principles for sustainable visitor management. Subsidiary policies will also be developed, along with a review of the existing Archaeology Policy and Nature Conservation Principles.
- c. Property Statements: The Trust is firmly committed to planning and prioritising property conservation (and other property-based activity) through the development of property statements (statement of significance, vision statement, financial statement and statement of intent). It will be essential to maintain the momentum of this work and to introduce a means of monitoring implementation.
- d. Practical Management: In a time of financial constraint, it is vital that efforts are focussed on essential "must-do activity". Previous investments of money, time and effort must be protected by effective maintenance. Programmes and areas of excellence must be sustained, if necessary at the expense of non-essential projects or new initiatives. Long term projects and programmes that should be sustained include:
  - i. Holistic upland management, including deer and stock management, and upland path repair.
  - ii. Woodland and scrub management and restoration.
  - iii. Control of invasive species at key sites, eg rhododendron, bracken at archaeological sites.
  - iv. Partnership working, particularly with tenants, farmers and crofters.
  - v. Designed landscape management.

- vi. Species Action programmes.
- vii. Preparation of Archaeological Action Plans on a property by property basis.
- viii. General estate maintenance (including structures such as paths, hedges, fences, dykes, buildings, bridges, and works required under the terms of grant schemes, such as Woodland Grant Schemes, etc).

## **Enjoyment and Education - Involving People**

*"The Trust aims to increase visitors enjoyment of Trust properties and to generate income for conservation work by developing its visitor facilities and education programme."*

**Education Strategy:** The Trust's Education Policy was revised in 2001 and it is intended to develop a national Education Strategy in 2002. There is already close co-operation between regional countryside and education staff in developing their respective strategies, thus ensuring well-matched priorities and approaches. In broad terms the Trust wishes to expand and diversify educational and interpretive opportunities both at its properties and equally through outreach and distance learning.

Specific countryside educational developments will include:

- a. Exploration of mechanisms to increase educational opportunities, including a pilot "teach the teacher" programme.
- b. Development of closer links and resources for the Tertiary sector.
- c. A strong link between educational and interpretive themes and the key features of the property, and the Trust's role in their conservation.
- d. Application of Trust-wide standards for education work, ensuring appropriate training for all staff and volunteers in areas such as the Childrens Act (Scotland).

**Managing Properties for the Visitor:** The Trust has some very good examples of properties where high quality conservation is mirrored by a warm visitor welcome. Efforts to maximise this welcome are being focussed on twelve properties, which include significant countryside properties such as the two Country Parks (Brodict/Goatfell and Culzean), Glencoe, Crathes and Killiecrankie. It is essential that any associated promotional activity harmonises with conservation sensitivities. At the same time many previously under-promoted sites could probably cope with increased visitor numbers without detriment to their key features. Countryside management staff will engage in the debate and will contribute to developing principles of visitor management and visitor management planning. Revenue raising opportunities, including charging for car parking, will be investigated, wherever this does not compromise the Trust's obligations regarding open access to the countryside. Visitors will be counted and attitudes/experiences surveyed at key properties.

**Countryside Around Town:** The Trust has over the years acquired a significant number of urban-fringe properties. Traditionally it has shown no great interest in developing the countryside visitor potential of many such sites. The Trust's profile could be enhanced by developing access and awareness opportunities at such properties, with spin-offs in membership recruitment and income generation. The Trust will explore this area of potential growth in its South and West regions.

**Volunteer Activity:** The work of short and long term volunteers continues to contribute significantly to the work of the Trust, whilst allowing volunteers to enjoy the Trust's special places and learn more about the Trust's work. Whilst development of long-term volunteering was put on ice following the deletion of the Head Office Countryside Adviser post, the work of the Conservation Volunteers continues to thrive. Local Groups are now managed largely from the regions, allowing Head Office to concentrate on Thistle Camp developments. These include Trailblazer camps for the under 19s (as part of our Adventure Activity Licensing Authority

activities) and the launch of Corporate Challenge, involving team building exercises for companies - a useful way of generating income, of interesting potential sponsors, and of achieving conservation work! All this volunteer activity will continue to be developed.

Access Opportunities: The development of Core Path Networks and Local Access Fora offers great potential for the Trust to ensure that its properties are linked to surrounding communities and other visitor attractions by appropriate footpaths, horse-riding routes and bicycle trails. Staff will wish to ensure that such access is appropriate to the qualities of the property and will have a lead role in promulgating the Scottish Outdoor Access Code. The Trust already leads by example in the management of uplands in conjunction with conservation and field sports use.

In managing the provision of countryside facilities and services, staff will be mindful of the provisions of the Disability Discrimination Act; DDA audits will be required for countryside properties within two years.

## **Promoting and Influencing**

*"The Trust aims to raise support for conservation and to increase its membership by promoting wider awareness and greater understanding of its work."*

Working in Partnership: Much of the Trust's work involves working closely with others, not least with colleagues in Scottish Natural Heritage. Such partnerships offer scope for sharing values and developing joint and best practices. Resources can be effectively spread, costs shared and funding geared up. Countryside staff will continue to contribute to all such productive working relationships.

Working with Communities: Communities of interest, local, regional or national, offer excellent opportunities for "spreading the word" as, by definition, they are committed. It is an area of activity where the Trust has not traditionally invested sufficient time or energy. Better involvement of local communities in "countryside around town" properties and greater communication with national user interests, eg mountaineers or people with disabilities, should be priorities, and will ultimately bear fruit in increased support for the Trust's activity. The Trust will be developing corporate approaches to working with local interests around its properties.

Demonstrating Best Practice: Perhaps the most effective way the Trust can promote its conservation credentials, and earn respect in the wider world, is through its ability to clearly demonstrate its leading edge skills in aspects of countryside management. Key areas of excellence will include:

- a. Welcoming the visitor/environmental education programmes: these will be particularly focussed on the Country Parks; staff training will be centred at Culzean.
- b. Visitor management planning: demonstrating "visiting without conflict", particularly at the National Nature Reserves.
- c. Footpath management and track removal, particularly within the National Parks, but broadly across Scotland's mountains.
- d. Development of standards for the above, and training courses; the possibility of VQ kite-marking, or other forms of validation, will be investigated.
- e. Holistic management of all aspects of the countryside - natural, cultural, social and economic.

Events: The Trust will continue to put itself in the shop window at specific events, such as Scottish Wildlife and Countryside Fair, and via themed programmes, such as International Year of the Mountain and a celebration of ten years of archaeology in the Trust.

Public Profile: It is essential that countryside staff maintain an active profile for the organisation, through articles, interviews, talks, events, but particularly through representation on relevant committees and partnership organisations, where it is possible to influence agendas and values in a highly constructive way.

Corporate Image: With less emphasis being placed on the "countryside ranger" per se, and more on countryside management, it is important that the countryside service does not lose its recognisable image. With a broader range of staff involved in countryside management, it would be appropriate for there to be one clothing style/image for all, but with those employed as countryside rangers still displaying the common ranger badge.

## **Organisation and Resources**

*"The Trust aims to become an increasingly well-managed organisation through training and development, effective use of funds and additional income generation."*

**Delivering Countryside Management:** Regional Countryside Managers, as part of the regional Conservation Teams, are charged with developing and implementing co-ordinated countryside management across their suite of properties. Each manager is developing a regional Countryside Management Strategy to reflect the particular circumstances and priorities of his/her region. There will be a new emphasis on greater team working, working beyond strict property boundaries, flexibility in working approaches and greater reliance on planning work via collective work outcomes or targets, rather than time inputs and individual work planning. There may be consequent redefinition of reporting lines with, for instance, Countryside Managers assuming line management responsibilities for area ranger services, foresters, etc. Countryside Managers will work closely with the Nature Conservation/Archaeological Advisers (Head Office and Regional). It will ultimately be for the Regional Conservation Managers to ensure co-ordination across the regions.

This broad shift to co-ordinated countryside management will be reflected at the national level by the development of this countryside management strategy (to include nature conservation, archaeology and land agency) and its acceptance by NTS and SNH as the major planning and performance monitoring tool for the national Concordat funding package. To be effective, this new approach will involve the development and agreement of key outcomes or performance indicators within this strategy - and a disciplined targeting thereafter of staff and other resources to achieve agreed objectives.

**Valuing, Investing and Involving People:** The Immediate Strategic Priorities identify the need to get best value from the Trust's staff and volunteers. At the heart of this process will be ensuring that all staff are aware of how their individual role contributes to the work of the organisation. A revitalised performance management programme is ensuring all staff have clearly identified targets set on an annual basis, and training and development needs identified and resourced. This generic work will be enhanced for countryside staff with annual seasonal ranger induction and ongoing input to the Countryside Training Network to ensure that the Trust's training needs can be met by training providers.

**Income Generation:** Countryside management will continue to play a leading role in generating support from the many sources available, including grant aid, donations and appeals, European sources, Landfill Tax and the Lottery Funds. As competition for these funds becomes more intense, the Trust will endeavour to become increasingly self-reliant, through the development of specific income-generating projects, such as appropriate car-park charging, and through targeted appeals to areas of maximum response: the use of Sole Trading in the uplands is a good example. However, it should not be forgotten that the greatest source of support, the Trust membership, is dependent on our ability to be seen as a leading force for conservation in Scotland.

The Senior Land Agent will assist regional staff by ensuring procedures and guidance are in place to cover other revenue related matters such as leases, agricultural and forestry grants, etc. There is a clear national policy role required to support and monitor local activity.