TAKING ROOT
Summary of the Year Two Corporate Plan
2013-2014
THIS IS A SUMMARY OF THE SECOND ANNUAL CORPORATE PLAN of the National Trust for Scotland’s Five-Year Strategy. The Strategy was set out at our 2011 Annual General Meeting and will take until 2016 to come to fruition.

In the first Corporate Plan, ‘Sowing the Seeds’, we devoted ourselves to putting in place the conditions necessary for the Strategy to be successful and ensure a sustainable future for the Trust and all that we care for. We launched the ‘Signature Projects’ that will act as proving grounds for enhancing every aspect of our work, we undertook fundamental reviews of our properties and collections and we initiated investment both in record-keeping and in support and development for our staff and volunteers.

Now, in Year Two, we will be building upon all the effort of last year and starting to see a return. The seeds we planted will be ‘Taking Root’.

The plan that follows represents a headline summary of the considerable work that is to come. We have entered a crucial period to ensure the changes that we have begun making are taking hold. We will see further emphasis on the role of Property Managers, supporting them in taking on more responsibility for driving forward improvement across all aspects of conservation and visitor experience. In the previous year we used the first phase of the Property Portfolio Review to understand better the significance of our estate and identify priorities for investment. We will now be moving the Portfolio Review to its next stage and at the same time beginning to take action on those priorities – particularly those where there are long-standing issues to resolve. The development of a Portfolio and Collections Policy will also help in determining future strategy across our estate.

The Signature Projects will also be moving up a gear and we will be expecting tangible progress, particularly in relation to Brodick; the learning points that emerge will be shared across the Trust. We will also be examining the way we communicate and engage with all of our stakeholders, using technologies to promote our heritage and to listen to what our visitors have to say. This will lead to a reappraisal of the way our ‘brand’ functions and in turn will help us appeal to wider and more diverse groups of people, allowing us to show that protecting our heritage matters to everyone.

Considerable time and resources have been put into shaping our approach to fundraising and this will result in one of the most important initiatives of the year as we begin a cycle of campaigning that we hope will touch many more people and inspire them to donate. Further investment in innovation and renewables should also yield vital revenues.

2012/13 was busy but 2013/14 will be even more intense. We must keep up the pace of reform because if we don’t the consequences would be unthinkable. By the spring of 2014, despite the world’s ongoing economic difficulties, I expect to show yet more progress from a stable to a more healthy and invigorated position.
Format of the Summary Plan

The following pages represent only a brief summary of the key actions that will be delivered by the Trust's staff and volunteers up until the end of February 2014. Each action is itself subject to detailed delivery plans which permeate departmental, property and individual personal objectives.

Detailed presentations on our progress in delivering this plan and our overall achievements with the Five-Year Strategy will be given at the 2013 Annual General Meeting and at Local Assemblies. We will also produce regular quarterly updates in summary format based on the performance indicators listed on the following pages and these will continue to be posted on our website.

Scope of the Plan

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

Delivering the Five-Year Strategy

*Securing the Future of Our Past* is focused on five strategic objectives covering: **The Portfolio and its Conservation; The Promotion of Scotland's Heritage; Financial Sustainability; Visitor Enjoyment; and, Investment in Our People.** The following key actions are expressed in relation to each objective and dovetail with eight previously identified strategic priorities (Portfolio Review; Advocacy for the Conservation of our Heritage; Signature Projects; Innovative Micro-Projects; Membership and Engagement; Major Fundraising Initiative; Skills Development; and, Staff and Volunteer Reward and Recognition).

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

It is not possible to realise this vision in one go – we are enacting the strategy in stages, having undertaken initial building and preparation we are now delivering in earnest. For that reason, and appropriately for the custodian of some of Scotland’s greatest gardens, we have likened the strategy’s delivery to a process of cultivation: the first year required us to ‘Sow the Seeds’. In this second year we must ensure our plans are ‘Taking Root’, then through further encouragement we will see ‘Growth’, leading in the following year to ‘Flowering’ and, in 2016/17, we will all benefit from the ‘Harvest’ they bring forth.

This second corporate plan for implementing the strategy is therefore devoted to ‘Taking Root’ and reflects the beginnings of serious progress that we are now starting to see.
## Strategic Objective 1 – The Portfolio and its Conservation

### Context:
Our portfolio reflects our core purpose (… to conserve and promote our heritage) and vision for the future and can be maintained to a high conservation standard.

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<th>ACTIONS</th>
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<tr>
<td>1.1 Create a Trust Portfolio and Collections Policy</td>
<td>• We will set out our rationale and procedures to acquire and hold assets of major importance for the nation</td>
<td>— Policy in place by February 2014</td>
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<td>1.2 Completion of the second phase of the Portfolio Review</td>
<td>• The Portfolio Review represents a fundamental review of all of our properties so that we can understand their significance, condition capacity and potential • The groundbreaking methodology applied in Year One of the Strategy has provided a useful start in identifying investment priorities • The second phase of the review will provide a ‘cost of care’ profile for our entire estate. Development of ‘fine grain’ information relating to underused assets, community context and options for better management arrangements for individual sites is underway</td>
<td>— Second phase of Portfolio Review completed by November 2013</td>
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<td>1.3 Introduction of Conservation Benchmarks and Guidelines</td>
<td>• The establishment of these indicators and guidelines will assist us in the management of our properties and will determine clear, common standards and expectations in terms of the control and care of our collections • These will be integrated within the Conservation Strategy and operational plans</td>
<td>— Each Conservation discipline will have in place a suitable plan by February 2014</td>
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<td>1.4 Detailed planning processes to be taken forward resulting in 75% of properties having up-to-date Property Plans</td>
<td>• The Property Plan enables property teams to address ongoing maintenance, conservation, visitor services, staffing and volunteering responsibilities • In Year One 50% of our properties prepared a new plan – however, these will have to be altered to fit a redesigned format that will be better fit for purpose. All properties now have a Statement of Significance which will guide our management of the heritage assets in our care</td>
<td>— Revised Property Plan template in place by April 2013 • Initial drafts of Property Plans in the new format by August 2013 • 75% of properties to have finalised Property Plans in place by February 2014</td>
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<td>1.5 Options for the future management of properties designated as ‘Signature Projects’ and ‘Priority Projects’ (See Appendix) will be investigated and described</td>
<td>• An assessment of specific issues, opportunities and options will be carried out for specific properties identified by Trustees as investment priorities • Decisions will be taken in relation to each element of the properties’ future in terms of conservation, visitor, estate and business management strategy, in each case tailored to available resources and management capacity • Plans will be prepared to guide future investment planning for the Signature Projects • A plan will also be prepared to enable strategic investment decisions about Culzean • A review to determine future options for the island of Canna will be undertaken</td>
<td>— Brodick plan completed and approved by July 2013 • Inverewe plan completed and approved by December 2013 • Culzean Conservation Management Plan and Business Development Framework completed and approved by October 2013 • Options described for: David Livingstone Centre July 2013; Hill of Tarvit September 2013; Drum November 2013; Canna review completed by December 2013</td>
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Continued overleaf
### Strategic Objective 1 – The Portfolio and its Conservation (continued)

**Context:** Our portfolio reflects our core purpose (… to conserve and promote our heritage) and vision for the future and can be maintained to a high conservation standard.

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| 1.6     | Estateman Database fully populated with core data and a related conservation asset management software package agreed | • All existing and additional estate management information will be uploaded for owned properties and other management responsibilities | — Estateman uploads completed by October 2013  
— Outline of Conservation Management Database by January 2014 |
| 1.7     | Ensure that scheduled projects essential to the conservation of our properties are delivered on time and within budget | • Property and specialist conservation service managers bring forward a series of projects each year that are essential to the ongoing care and maintenance of our properties  
• We have instituted a new system of project assessment which will ensure that only those projects that can realistically be completed on schedule are opened | — Achieve forecast project spend |
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<td><strong>Strategic Objective 2 – The Promotion of Scotland’s Heritage</strong></td>
<td><strong>Context:</strong> We tell the stories of all our properties and collections in compelling and inspiring ways. We encourage the effective protection of our natural, built and cultural heritage.</td>
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<td><strong>2.1 The Battle of Bannockburn Project</strong></td>
<td>2013 will see important milestones in the delivery of the physical works to create the state-of-the-art new visitor centre, exhibition and landscaping, as well as promotional activity to herald the events marking the 700th anniversary of the battle and describe its historical context</td>
<td>— Specialist event management contractor appointed to take forward opening re-enactment events by March 2013 — Website and online booking office launched June 2013 — Monument refurbishment completed by end June 2013</td>
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<td><strong>2.2 Engage with members, potential visitors, communities (both geographic and interest) and key stakeholders around our conservation activity, property events and appeals through the AGM, Local Assemblies, Regional Panels, Friends’ Groups and the media</strong></td>
<td>We will aim for wide recognition for the work the Trust is undertaking for local heritage, in particular through campaigns and events linked to the ‘Year of Natural Scotland’</td>
<td>— Four Conservation seminars staged by February 2014 — AGM to be held in September 2013 — Four Local Assemblies staged by February 2014</td>
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<td><strong>2.3 Devolve local communications planning to Property Managers within the context of their Property Plans</strong></td>
<td>Property-based staff and volunteers will be supported and encouraged to identify local communications activity and stakeholder engagement opportunities — This will lead to more localised control and flexibility in encouraging recognition of the heritage represented in each property and the enjoyment it offers</td>
<td>— 75% of properties to have incorporated communications into Property Plans by March 2014</td>
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<td><strong>2.4 Enhance the accessibility and quality of information and content offered to members, visitors and other stakeholders via digital and social media</strong></td>
<td>— The navigation tools and organisation of the Trust’s website will be improved in order to provide better and easier access to the information and images contained — It is vital that the Trust enhances digital support of its properties as much as possible in order to entice more visitors and highlight the benefits of becoming a member of the Trust — Specific initiatives will include delivery of a Social Media Engagement Strategy and introduction of mobile apps with trails and routes to follow through our properties as well as ‘virtual access’ to our collections</td>
<td>— Development of the website to be completed by February 2014 — Facebook and Twitter followers to be increased by 11% by February 2014 — Unique visitors (per annum) to the main NTS website to be increased by 10% by February 2014</td>
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<td><strong>2.5 Advocacy for the conservation of heritage</strong></td>
<td>Develop our work on landscape conservation, including energy developments and the care of local landscapes — Identify and research a second advocacy theme, alongside ongoing policy work</td>
<td>— Engagement with external partners to advance landscape conservation concerns, including two workshops by February 2014 — Second advocacy theme scoped and launched by March 2014</td>
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**Strategic Objective 3 – Financial Sustainability**

**Context:** We run the Trust efficiently and within its means, setting and measuring performance against clear targets.

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| 3.1 Implement the first year of the new Fundraising Strategy | • In the course of the foregoing year we developed a strategy for significantly increasing our annual fundraising income: this year will commence with implementation of the strategy  
• The money we raise will be used to secure Scotland’s heritage on a sustainable basis | — Recruit four additional fundraisers  
— Provide new themed opportunities to encourage support by May 2013  
— Meet Fundraising Strategy targets |
| 3.2 Continue the roll-out of our Electronic Point of Sale (EPOS) system across our portfolio of properties | • EPOS provides ‘real time’ capture of membership and visitor information, including the preferences and choices of our retail and catering customers  
• This information allows us to be more responsive to customer needs | — A further ten properties will be using EPOS by December 2013 |
| 3.3 Identify the five best opportunities for exploiting renewable energy within the Trust’s portfolio | • We believe that there are considerable opportunities to utilise renewable energy technologies sensitively within the Trust’s portfolio of properties  
• We wish to identify where we might reduce energy costs at particular locations and also explore whether we might be able to generate additional income from feed-in tariffs | — Identify five new opportunities by November 2013 |
| 3.4 Increase membership numbers by 4,000 | • Increased membership helps sustain the Trust and is critical to our responsibility to share and promote the treasures of Scotland’s heritage | — Net increase in Trust membership of 4,000 by February 2014 |
| 3.5 Identify the next five micro-projects under the Buccleuch Innovation Awards | • These small-scale innovative projects are proposed by staff and volunteers  
• Those selected will allow us to better achieve our strategic objectives and will be awarded development funding | — Five micro-projects announced and underway by April 2013 |
| 3.6 Implement the first year of the Trust’s Climate Change Action Plan | • The plan has been developed to reduce the Trust’s contribution to climate change through cutting energy consumption, use of renewable energy and staff training  
• The plan also touches on our land management policies and involvement in the Green Tourism Business Scheme  
• The plan is to be delivered over a period of years but specific actions are required in the first year | — All identified Year One actions completed by February 2014 |
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<td><strong>Strategic Objective 4 – Visitor Enjoyment</strong></td>
<td><strong>Context:</strong> We deliver a consistently high-quality visitor and membership experience which appeals to a broad range of people.</td>
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<td><strong>4.1 Prepare a new strategy for Learning and Interpretation activity across the Trust, with the aim of expanding our role as an educational resource and improving visitor experience</strong></td>
<td>• The Trust’s work in interpreting our collections and properties is already well appreciated by visitors and educationalists alike – we wish to go further as part of our goal of highlighting the intrinsic value of heritage to Scotland and the world&lt;br&gt;• Our Signature Projects will be proving grounds for the latest techniques and best practice and will support development and consultation around a new Learning and Interpretation Strategy</td>
<td>— New Learning and Interpretation Strategy completed and published by February 2014</td>
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<td><strong>4.2 Improve catering profitability and the quality of visitor experience the service provides across Trust properties</strong></td>
<td>• The purpose of providing catering services at our properties, apart from enhancing visitor enjoyment, is to generate a contribution to meeting the costs of conservation&lt;br&gt;• We need to improve the profitability in some of our catering operations so that they can better support the upkeep of properties&lt;br&gt;• We will invest in some catering outlets to improve both the quality of food and the ambience for visitors</td>
<td>— Achievement of catering budget targets by February 2014</td>
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<td><strong>4.3 Improve the collection of data on visitors to properties</strong></td>
<td>• The more we know about our visitors, the better we can serve their needs&lt;br&gt;• Clarity on the number of visitors will help us target investment where it is needed</td>
<td>— Establish verifiable baseline by February 2014</td>
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<td><strong>4.4 Develop customer care standards and invest in training and supporting ‘Visitor Experience Champions’ across the Trust</strong></td>
<td>• Ensuring every visit to a Trust property is a special one is integral to our strategic objectives of Visitor Enjoyment and Promotion of Scotland’s Heritage&lt;br&gt;• We will agree the necessary standards and support staff and volunteers in meeting them</td>
<td>— By September 2013</td>
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### Strategic Objective 5 – Investment in Our People

**Context:** Our people are motivated, fairly rewarded and have the right skills.

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<tr>
<td><strong>5.1 All Trust Management Team and Property Manager staff to have completed the core elements of our Management and Leadership Development Framework</strong></td>
<td>• Addressing skills gaps and training needs identified in the ‘Sowing the Seeds’ year is crucial to the effective functioning of the Trust and meeting our strategic objectives</td>
<td>— Completed by February 2014 for existing staff</td>
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<td><strong>5.2 Gain formal accreditation for our Management Development Framework</strong></td>
<td>• Provision of best practice training for our managers and leaders is crucial for our continuing success • Further to our launching a framework for such training, we aim to gain accreditation of this through an appropriate body, such as the Institute of Leadership and Management or the Chartered Management Institute</td>
<td>— Accreditation gained by February 2014</td>
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<td><strong>5.3 Finalise and commence the roll-out of our Careers Development Programme</strong></td>
<td>• We will audit the success of the trial undertaken in the ‘Sowing the Seeds’ year • Following this, we will take forward a substantive programme aimed at encouraging career development in line with the Trust’s business needs</td>
<td>— 15 programme participants by October 2013</td>
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<td><strong>5.4 Roll-out ‘reward’ initiatives for staff and ‘recognition schemes’ for both staff and volunteers</strong></td>
<td>• Good practice in both reward and recognition is an important contribution towards maintaining a well-motivated workforce and in the recruitment and retention of staff and volunteers • In the last year we carried out a scoping and benchmarking study and this year we will aim to take forward good practice recommendations, subject to affordability</td>
<td>— By September 2013</td>
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<td><strong>5.5 Attain the Healthy Working Lives Bronze Award</strong></td>
<td>• The health and wellbeing of our staff and volunteers is of paramount importance and fundamental to the Trust’s effective functioning • In the coming year we will put in place the foundations for the Healthy Working Lives standard and seek to attain the Bronze Award, which is in keeping with this aim</td>
<td>— Award attained by February 2014</td>
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Key Performance Indicators

In addition to the outputs specified in the preceding pages, we will show progress in delivering our actions throughout 2013–14 via a range of Key Performance Indicators (KPIs). These are defined in the following table:

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<th>Strategic Objective</th>
<th>KPI</th>
<th>Measurement Frequency</th>
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| The Portfolio and its Conservation                       | (a) Progress against annual schedule for completion of conservation plans  
(b) Project spend against forecast                                  | Both Quarterly         |
| The Promotion of Scotland's Heritage                     | (a) Membership numbers against budget  
(b) Number of paying visitors  
(c) Number of seminars and outreach activities                      | All Quarterly          |
| Financial Sustainability                                | (a) Number of properties operating at or better than budget  
(b) Fundraising achievement against target                            | Both Quarterly         |
| Visitor Enjoyment                                        | (a) Visitor enjoyment survey score  
(b) Number of visitors  
(c) Membership profile                                              | (a) Annual  
(b) Quarterly  
(c) Annual               |
| Investment in Our People                                | (a) Staff satisfaction as measured by annual survey  
(b) Volunteer satisfaction survey score  
(c) Training hours delivered against target  
(d) Achievement of all targets under our corporate Health and Safety Policy | (a) Annual  
(b) Annual  
(c) Quarterly  
(d) Quarterly               |
APPENDIX

NTS Property Investment Priorities

Signature Projects

- Brodick Castle, Garden & Country Park
- Inverewe Garden & Estate

Priority Projects

- The Battle of Bannockburn
- Culzean Castle & Country Park
- David Livingstone Centre
- Hill of Tarvit
- Drum Castle, Garden & Estate
- Canna
- Mar Lodge Estate
- Threave Garden & Estate
- Brodie Castle
- Leith Hall
- Pollok House
- Arduaine Garden

Operational Projects

- Circa 500 ongoing operational projects

Signature Projects are one of the Trust's eight strategic priorities. They are effectively multi-disciplinary 'proving grounds' for everything we do at property level: from visitor interpretation to catering; from conservation techniques to energy use; from partnership working to income generation. The lessons learned through the projects will be applied across the Trust's estate.

Priority Projects have been identified following careful assessment of the Trust's estate. These projects will be given priority for available investment in order to take forward important conservation work, deal with long-standing issues and/or make improvements and enhancements that will make a significant difference to visitor experience and future management arrangements. This is a dynamic process which will see some priority projects coming off the list and new ones added, as we progress through the list.