

Study on the National Trust of Trinidad and Tobago



Initial Report

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Finally, I must thank Minister Clifton de Coteau for his enthusiasm, engagement and openness. Without his leadership and support, none of this would have happened.

The report is based on one short visit to Trinidad and Tobago, including a two-day workshop session and various conversations with stakeholders, but this has been set against a background of accumulated knowledge of the different approaches taken by National Trusts around the world and I truly hope it meets the expectations and demands of Minister de Coteau, who commissioned it, and all the wonderful and passionate Trinbagonians I met along the way.

Executive Summary

a) Background and purpose of this report

The nation of Trinidad and Tobago faces many challenges to the preservation of its heritage assets. These challenges reflect the country's particular social and economic circumstances of the 21st century.

The varied ethnic groups that have made Trinidad and Tobago their home over the years – including Indians, Chinese, Portuguese, Syrians, Africans, English, French and Spanish – have all contributed to the rich multiculturalism which now defines the islands. This is reflected in the country's music, dance, musical instruments and cuisine as well as its rich material heritage.¹

Whereas in other Caribbean islands the preservation of built, natural and cultural heritage resources has been closely linked to economic development, until now tourism has played something of a back seat role in Trinidad and Tobago's thriving economy, based on energy and oil finds dating back to the 1950s.

The lack of a pressing economic need to conserve and exploit its heritage assets, combined with a sense of cultural identity perhaps more rooted in calypso and steel pans; doubles and roti than a shared sense of place, has meant that the wider benefits of a good quality historic and natural environment have yet to be recognised at all levels.

The acknowledgement, remarked upon by Minister de Coteau that 'architectural heritage, as an ingredient of tourism, is vitally important to the economy of our nation, while the preservation of our historic buildings is a sure way of documenting, in a real way, the rich history of our past for future generations' is a welcome one.² At the moment, of the architectural treasures listed on the Tourism Development Company Limited (TDC) website under Trinidad and Tobago's Built Heritage, few are open to the public and of those that are, two are churches, one is a religious monument, one is a museum and one is a sort of self-service hotel.³ While there is great potential for the industry, there is also great need to improve the quality of the local tourism product and to ensure long-term sustainability. The TDC is clear about the role of the local population in developing the industry and improving the tourism infrastructure of the islands.⁴ Tobago does have a more significant tourism industry, but most visitors come to energy-rich Trinidad as business travellers or to visit family. The exception is of course Carnival, when many thousands of tourists arrive to witness the famous calypso and steel band music and the colourful parades.⁵

As in most countries, heritage conservation does not fall neatly under the banner of one single Government department and necessitates interaction between a wide range of policy areas. At present the Ministry of Works is responsible for historical buildings while de Coteau's ministry holds the responsibility for heritage sites. At the workshop, the Minister underlined his call to bring these entities under one umbrella.

With a limited legal framework for built heritage conservation that provides for one type of statutory protection but which has yet to be fully deployed (listing), competing demands for funding and strong market pressure for redevelopment, the Government must strike a difficult balance between heritage conservation and broader interests. Public concern for heritage

¹ http://www.tdc.co.tt/our_culture.htm

² Maclean, Geoffrey (2012) *The Built Heritage of Trinidad and Tobago*, National Trust of Trinidad and Tobago. Foreword by Minister of National Diversity and Social Integration p 6

³ <http://www.tdc.co.tt/media/?id=pk1>

⁴ http://www.tdc.co.tt/our_industry.htm

⁵ <http://www.nationsencyclopedia.com/economies/Americas/Trinidad-and-Tobago.html>

conservation is increasing but civil society organisations, whilst enthusiastic and knowledgeable, are in their infancy and seem meagrely resourced.

As part of its response to these challenges, the Ministry of National Diversity and Social Integration commissioned this report into the work of the Trinidad and Tobago National Trust, which was established in 1999 but has yet to achieve the success, support and recognition hoped for.

b) Key questions for the Trinidad and Tobago National Trust

- What should be the remit and responsibilities of the National Trust?
- How can popular support be mobilised in Trinidad and Tobago?
- How should it be resourced?
- What needs to change to make the National Trust more operationally effective?

We see all over the world that Trusts are facing similar challenges. As a global movement, we face the on-going challenges of neglect, environmental change, conflict and disaster. The current unsympathetic financial environment means that funds, both public and private, are less forthcoming but also that threats to special places increase as governments try to kick start sluggish economies by relaxing planning laws or building their way out of the crisis. Interestingly the Yangon Heritage Trust, a newly established ngo, last year successfully lobbied for a moratorium on the demolition of colonial buildings to slow the fast rate of loss of historic sites.⁶

Tougher times can however mean that people think less about material wealth or status and instead take comfort in family and community, places they love, the appreciation of beauty, fresh air and a sense of kinship with each other, with the past and with the natural world.⁷ Which can only be good for National Trusts!

To address these four particular questions, a number of lessons can be learned from the international National Trust movement and research highlights the importance of:

i) Providing a clear articulation of the Trust's mission and status

- National Trusts all over the world are founded on common principles, yet each has developed according to the local circumstances. Many National Trusts have very simple missions. Looking after special places 'for ever, for everyone' sums up the core purpose of the Trust in England, Wales and Northern Ireland and has been copied around the world. The tagline of the US National Trust for Historic Preservation is 'Save the past. Enrich the Future.'
- National Trusts have dedicated much time and resource to planning – from overall strategic planning for the organisation to business plans for individual properties, from personal development plans for staff to tailored statements of significance for special places. Strategic focus, relevance and simplicity are essential ingredients.
- The Trinidad and Tobago National Trust has a wide remit and many responsibilities, which straddle public engagement and regulation. It could be said that this dual role has given

⁶ <http://www.abc.net.au/lateline/content/2012/s3497521.htm>

⁷ National Trust (2010) *Going Local – Fresh tracks down old Roads, Our strategy for the next decade* Page 2

the organisation something of a split personality. Clarity is needed as to whether the National Trust is a citizen movement or an arm of government.

- For some it feels a little like a scapegoat, with inadequate resources and not enough teeth to be truly effective. This should be addressed and a communication drive undertaken to reposition the Trinidad and Tobago National Trust within the public consciousness.
- It is not uncommon for Acts of Parliament governing National Trusts to be updated⁸ but the process can be long and laborious, necessitating wide public consultation and valuable Parliamentary time.
- National Trusts are traditionally non-governmental organisations, although often incorporated by Act of Parliament. In practice, all National Trusts have established good links into government (some have Ministerial appointees on their Boards⁹) and may receive some State funding.
- However, the model of a quasi-autonomous nongovernmental organisation (QUANGO) National Trust is quite common in the Caribbean region. Indeed a Trust that receives capital funding from the Government and potentially publicly owned properties does require the status of a statutory body.
- On remit, the Trinidad and Tobago National Trust plays a role in education, technical research and conservation projects. Trusts do not normally get involved in policymaking, but many, as here, advise on policy direction. Responsibility for grading is rare.
- It seems preferable at this stage for the National Trust to persevere with its current constitution. However, it is essential that the legislation governing the Trust is followed correctly and that the more helpful provisions in the Act are taken advantage of.
- Having accepted the principle that no change is necessary to the National Trust Act, the Trust's remit must remain as described therein, although a review of its regulatory role (listing and enforcement) is recommended in the long-term, including the maximum level of financial penalties for damaging property on the Register, and membership fees.

ii) *Eliminating overlaps and duplication of efforts in the heritage sector and focusing on unmet needs*

- There are a number of bodies involved in heritage conservation in Trinidad and Tobago and it would be beneficial to review the institutional configuration to enable the Trust to carve out a definitive role.¹⁰
- It would also be helpful to delineate the roles and responsibilities of the National Trust and Citizens for Conservation. Heritage trusts have the potential to bring alternative approaches that supplement Government efforts in preserving a country's heritage (although they could not replace Government's role entirely) and collaborative working with partner organisations would bring benefits to the whole sector.
- A heritage trust, as opposed to a Government entity, is more likely to have an entrepreneurial approach and to recruit staff with appropriate private and voluntary sector

⁸ The National Trusts Acts of Scotland, New Zealand and of England, Wales and Northern Ireland, to name but three, have in the last few years been modified.

⁹ St Lucia has 2 Ministerial appointments, in Guyana the whole board is appointed by Cabinet, in Belize 3 members are from government, even the National Trust of England, Wales and Northern Ireland has 2 government appointees on its Council (representing the Secretary of State for Northern Ireland and the Countryside Council for Wales).

¹⁰ Minister de Coteau has applied to have the Historical Restoration Unit transferred to his Ministry.

experience. It would also enjoy the flexibility of a not-for-profit organisation, allowing it to develop partnerships with the private sector, to respond to changing circumstances, and attract a group of concerned members of the public.

- With strong support from the community, an independent National Trust can play a differentiated and positive role in engaging the community to promote heritage assets and need not duplicate existing entities.

iii) Developing a constituency that believes in the work of the Trust, whether as members or supporters

- By devoting energy to reaching out to a new generation of young people who appreciate and are willing to support heritage causes, Trusts begin to secure their future.
- To mobilise widespread public support, the Trust needs sufficient independence to seize on issues of importance and raise funds. Dedication, integrity, transparency and professionalism are also important if it is to be considered credible and 'trust'worthy.
- Seemingly constrained by its lack of financial and decision-making independence, the Trust has been unable to fully implement its civil society functions. After a long period of what is perceived to be 'inactivity', it is viewed in some quarters with some scepticism. There is an opportunity here for repositioning.
- Membership is a realistic proposition and seems both socially and financially feasible. Servicing a membership can be expensive and needs adequate incentives for people to join. It is worth noting that in the US, the cost of servicing the membership (\$2.6m) exceeds membership income (\$1.6m in 2011). From a purely financial outlook, the National Trust for Historic Preservation (NTHP) loses money on memberships, however, the value of members to a National Trust goes beyond their monetary scope. The strength in numbers behind the preservation movement has a key role to play in the power of advocacy and political might which is put behind the NTHP.¹¹
- The difference between 'paying members' and 'interested individuals' is a live issue and the Heritage Canada Foundation is in fact moving away from a membership model to developing a group of 'supporters'. The National Trust of England, Wales and Northern Ireland has a very sophisticated membership programme, hardly surprising when the organisation's 4 million members contribute in the region of £140m (US\$216m) per annum, the single largest source of supporter income.
- International experience shows that organisations with an extensive property portfolio are generally more successful in building a large membership. However, in the case of Trinidad and Tobago, whilst it has proved difficult for the Trust to begin acquiring property, it has been able to recruit members through offering other benefits (such as heritage tours and lectures). Although perhaps unsurprising given the very low cost membership fee.
- To build an active and creative outreach programme to attract and retain members the Trust will need to develop its membership marketing capacity.

iv) Establishing sound financial planning to ensure that core costs are met and operating costs are covered through endowments or other revenues

- Ideally, through efficient management and a realistic business plan, the National Trust could be expected to make only modest demands on the public purse. Adopting a

¹¹ Nordstrom, Rachel (2013) *The Development of a National Heritage Organisation for Kosovo Cultural Heritage without Borders*

business approach, the Trust could develop multiple sources of income, including membership subscriptions, admissions, building rental, fundraising events and investment from seed money alongside its Government subvention. Having alternative sources of funding will strengthen the Trust's position as different administrations can have different attitudes to heritage and a degree of financial independence – and security – is essential.

v) *Adequate attention to governance and selecting personnel with strong leadership qualities who are able to convey the importance of the Trust and attract others*

- The governance of successful Trusts stands up to a high level of public scrutiny. Building a strong, influential and cohesive Council is an important element in the Trust's long-term viability and success.
- Operational responsibility is usually delegated to a salaried Chief Executive Officer (CEO) who is fully accountable for all aspects of the successful running of the Trust. He or she ensures that both its day-to-day activity and its strategic development reflect the very highest standards of businesses and charitable foundations, and heritage conservation best practice.

c) Governance and structure

i) *Council and Governance Structure*

Openness, transparency and accountability should be at the heart of National Trust governance. The better run the Trust, and the more open it is to those who wish to get involved, the more successful it will be. One of the most important ways of achieving this goal is through the appointment, selection or election, as appropriate, of high calibre volunteers capable of overseeing the governance arrangements of the Trust, ensuring that it remains focused on achieving its mission efficiently and effectively. Selection processes should be conducted in an open and transparent way, designed to be thorough, robust and expeditious, applied consistently and fully explained and comprehensible.

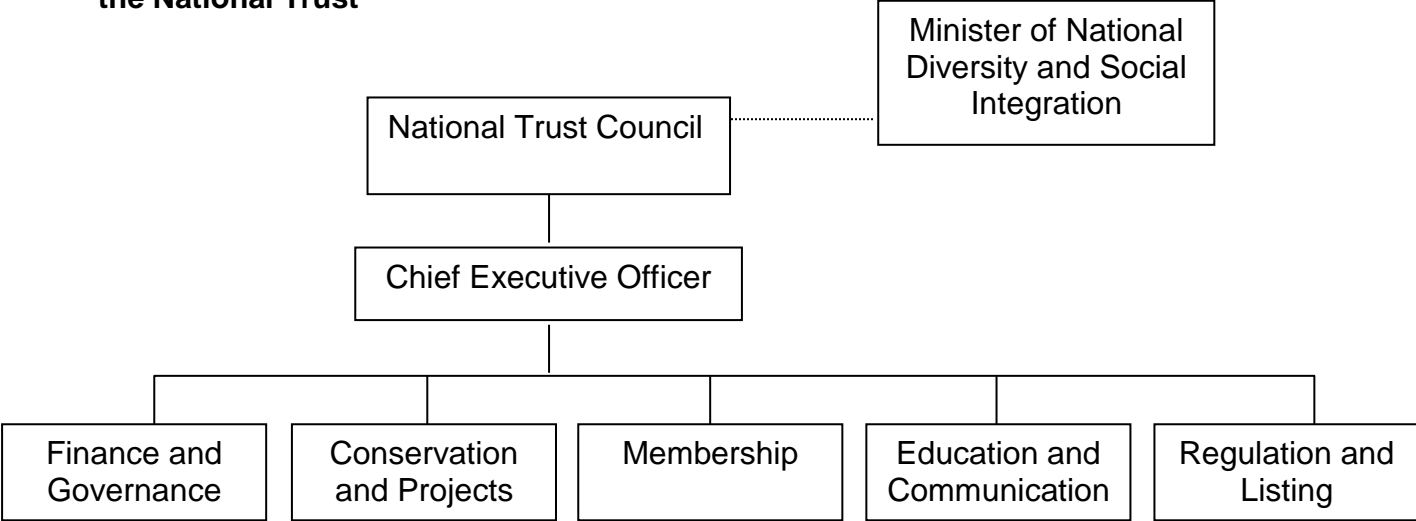
The adoption of private sector management practices can result in a more business-like style of working, improving efficiency and reducing costs. The Council should include a well-respected, charismatic and experienced Chairman preferably from the private sector, and should be representative of the Trust's diverse constituencies, serving as an influential voice for heritage conservation and providing strong, sound direction and oversight. More detailed work needed to support the work of the Trust can be undertaken by sub-committees as it is currently at the Trinidad and Tobago National Trust.

The Council and senior Trust executives should develop and publish the Trust's vision, mission and values, and would determine Key Performance Indicators for regular performance assessment.

ii) *Internal organisational structure*

An injection of passion, experience and leadership could make all the difference to the Trinidad and Tobago National Trust and finding the right CEO may take some time. Typically a CEO would be supported by the following teams: Finance, Conservation, Membership, Education and Communications. In the case of Trinidad and Tobago, it would seem sensible to have an additional department focussed on the regulatory aspects of the Trust's work. The functions of Education and Communications could be combined in the first instance, although would ideally two separate teams in the longer term. A proposed organisational structure is depicted overleaf.

Desirable organisational structure of the National Trust



d) Recommendations to the Minister of National Diversity and Social Integration

There are a number of recommendations flowing from this Report, many of which can be acted upon by the Trust Council or staff. Below is a list of key proposals for consideration by the Minister.

- i) The National Trust Act gives the organisation significant powers and responsibilities. It is recommended that the Ministry reviews compliance with the Act, before deciding on the longer term need for re-write.
- ii) Following the vote of no confidence in the National Trust Council at the May workshop, the required resignation of its Members and Chairman seems unavoidable. A new Council should be recruited (with those who have stepped down being invited to reapply if they wish) to build a cohesive, multi-talented, exemplary body to lead the Trust forward. It is essential that the new Council has public support and that the selection process is understandable, robust and fair. The new Council should have the right mix of influential public figures with access and name recognition alongside others with financial acumen, tourism experience, etc.
- iii) In tandem with the above, a new salaried position of CEO should be created. This individual should be dynamic, entrepreneurial, business-minded and empowered to lead the organisation (a suggested role profile is attached in Appendix 1). INTO's offer to second a senior level National Trust executive for 3-6 months to assist with the transition and delivery of strategic plan should be explored.
- iv) Working with the Council, the CEO should develop, champion and lead a 5-year strategic/business plan for the Trust that has clear, measurable goals and is simple, consensus-building, ambitious – yet achievable and flexible. The CEO must participate in National Trust Council meetings.
- v) As the Trust still currently relies on government subvention, a longer-term budget should be agreed to allow for better planning.
- vi) The government is urged to implement financial incentives for heritage conservation – financial instruments such as tax benefits, revolving funds or vehicles for Public-Private Partnerships (PPPs) in the heritage sector. The establishment of an endowment, Heritage Fund or seed money scheme to grow independence from government should also be considered.
- vii) Conclude immediate stabilisation of Mille Fleurs.
- viii) Consider the establishment of a PPP between the Historical Restoration Unit (ideally now under the aegis of the Minister of National Diversity and Social Integration) and a coalition including the National Trust, Citizens for Conservation and other stakeholders (potentially also major funders), to manage the restoration, ongoing conservation and future use of Mille Fleurs. This will empower the solicitation of private funds using the many wonderful awareness-raising suggestions made at the workshop and bolster the vital process of community engagement needed to ensure the longer term success of the National Trust. It will also encourage a culture of responsibility for what happens to the historic environment. No more 'What are you doing about Mille Fleurs?' but 'What are WE doing?'
- ix) Appoint a steering committee to review and implement the proposals in this report.

1. Introduction

1.1 Background of report

In 1985, following the public outcry over the intended demolition of the 'George Brown House' on the Queen's Park Savannah in Port of Spain, Trinidad, hundreds of people, concerned about the lack of appreciation of the nation's architectural heritage joined the protest and 'Citizens for Conservation' was born. It soon became the vanguard and voice for the protection of the natural and built heritage of Trinidad and Tobago.

One of the achievements of CfC was the drafting of the National Trust Act of Trinidad and Tobago, passed by Parliament in 1991 and enacted in 1999 with the establishment of the National Trust of Trinidad and Tobago.

Fourteen years on, Citizens for Conservation, working closely with Honourable Clifton de Coteau, Minister of National Diversity and Social Integration, have instigated an objective review of the National Trust of Trinidad and Tobago to take forward conservation efforts for the benefit and enjoyment of present and future generations.

The National Trust of Trinidad and Tobago is a statutory trust and membership organisation, capable of owning property and responsible for the listing, acquisition and permanent preservation of 'property of interest'; providing access and enjoyment thereto, encouraging research and compiling records; raising general awareness of the heritage of Trinidad and Tobago; and advising the Government on all conservation matters.

To date, progress on these objectives has been patchy and CfC reached out to the International National Trusts Organisation (INTO) for advice.

1.2 Approach to report and report structure

The original scope of the study included:

- i) A review the current framework, governance, financial arrangements and strategy of the Trinidad and Tobago National Trust
- ii) Comparison with other heritage trusts and/or similar establishments, as well as their experience and relevance to Trinidad and Tobago
- iii) Stakeholder interviews with individuals such as Trust staff, members and volunteers, Council members, government officials, property owners, conservationists, etc
- iv) An assessment of the above and observations and recommendations, in the form of a report, on:
 - The current role, objectives, functions, powers and work focuses of the National Trust
 - Other possible statutory, financial, organisational and operational models for the Trust, having regard to best practices elsewhere and the particular circumstances in Trinidad and Tobago
 - Recommendations on implementation of next steps

The report also includes a synopsis of the outcomes of the 2-day workshop.

1.3 Limitations

This report is based on an amount of desk research and a short visit to Trinidad and Tobago, made even shorter due to an aircraft failure, which meant missing valuable orientation time with both the National Trust and Citizens for Conservation.

It is not meant as a comprehensive review of the National Trust of Trinidad and Tobago, but rather part of the on-going process to build the organisation into a strong, confident, successful and dynamic leader of efforts to preserve Trinidad and Tobago's remarkable built and natural heritage.

The document seeks to highlight some of the challenges currently faced by the National Trust and, drawing on international experience, provide some options for moving forward. The author recognises the cultural differences between the case studies and that certain aspects will work in Trinidad and Tobago while others will not.

1.4 Background of author

Catherine Leonard joined the National Trust of England, Wales and Northern Ireland in 1999. Prior to this, she worked for the Foreign and Commonwealth Office and in teaching modern foreign languages to primary school children. Catherine has a background in linguistics, having graduated in Russian and German from the University of Bristol, and her work to date has built on the skills gained during these studies including: communication, research, strategic thinking and international networking.

Throughout the preparation of this report, expert advice was sought from a number of sources to promote a multi-faceted approach and to ensure accuracy. However, given the time allowed and the limited amount of exposure to the National Trust of Trinidad and Tobago, the author asks for forbearance for any misinterpretations.

2. Trinidad and Tobago National Trust¹²

2.1 Role and purpose of the Trust

Vision: The vision of the National Trust is focused on improving communities through the safeguarding of the built and natural heritage.

Mission: The specific mission of the Trust is to lead the efforts for the preservation of Trinidad and Tobago's built and natural heritage.¹³

The National Trust of Trinidad and Tobago was established by Act No. 11 of 1991 and amended by Act No. 31 of 1999. The Trust sees its role as making improvements to our communities through the preservation of our built and natural heritage. The major responsibilities of the Trust include the following:

- (a) listing and acquiring such property of interest as the Trust considers appropriate;
- (b) permanently preserving lands that are property of interest and as far as practicable, retaining their natural features and conserving the animal and plant life;
- (c) preserving, maintaining, repairing and servicing or, arranging for the preservation of property of interest other than land and where such property of interest comprises buildings, augmenting the amenities of such buildings and their surroundings;
- (d) making provision for the access to and enjoyment of property of interest by the public;
- (e) encouraging research into property of interest including, where applicable, any animal, plant or marine life associated therewith;
- (f) compiling photographic or architectural records of property of interest;
- (g) making the public aware of the value and beauty of the heritage of Trinidad and Tobago; and
- (h) advising the Government on the conservation and preservation of property of interest and on any or all of the matters referred to above.¹⁴

The broad objective of the National Trust can be identified as follows:

1. To protect and promote the care and preservation of significant examples of Trinidad & Tobago's built and natural heritage.
2. To promote access for all Trinidadians and Tobagonians to their heritage.
3. To foster a greater awareness and understanding of Trinidad & Tobago's heritage for the benefit of the wider public.
4. To encourage the continued development of excellence and participation in the Trust.¹⁵

¹² The following information has been taken from documents provided by the National Trust or found on the internet.

¹³ Taken from Trinidad and Tobago National Trust facebook pages (in absence of dedicated website)

¹⁴ General purposes of the Trust, National Trust of Trinidad and Tobago Act, Section 5

http://rgd.legalaffairs.gov.tt/laws2/alphabetical_list/lawspdfs/40.53.pdf

¹⁵ National Trust budget document 2013/14

2.2 Powers

Subject to the National Trust Act 11 of 1991 (amended by Act No. 31 of 1999) the Trust may:

- draw, accept and make and endorse, discount and negotiate bills of exchange and promissory notes and all other negotiable instruments pertaining to the business or operations of the Trust;
- raise money by borrowing;
- retain the services of professional and technical advisers and pay the fees of such advisers;
- employ upon a temporary or permanent basis professional, technical, clerical and other officers and servants and make provision for pensions and other incentives;
- solicit funds by means of subscription, donations, bequests, grants and in such other manner as it considers expedient for the effective carrying out of its functions;
- impose charges upon the public for viewing or making use of property of interest vested in the Trust.

2.3 Responsibilities

a) *Does the Trust own/manage any assets?*

The National Trust was granted jurisdiction of Nelson Island in 2003. In practice, this seems to mean that the Trust was involved in plans to restore and interpret the site, but that it had not been fully accountable for its management.

b) *Types of public awareness activity*

The Trust has designed a variety of programmes which are intended to promote education and awareness of functions of the National Trust and build an awareness of the need for heritage conservation and preservation in Trinidad and Tobago.¹⁶

The National Trust does not have a functioning website but it does have a facebook page.

c) *Education programmes*

The National Trust conducts tours to various parts of the country on a regular basis. These tours attract a large number of persons representing a wide cross-section of society.¹⁷

The Heritage Lecture Series started in 2007 and has attracted large audiences.¹⁸

In 2011, the above programmes (tours and lectures) were the two largest items of expenditure (adding up to circa TT\$335,000 [US\$55,000] and a third of annual spend) in the Annual Accounts after the Directors fees and travel.

d) *Membership*

Under the provisions of The National Trust Act No. 11 of 1991, public participation is guaranteed through the following (amended by Act No. 31 of 1999) nine classes of membership, with subscriptions as follows:

- Ordinary Membership \$ 25.00 (US\$4)

¹⁶ National Trust of Trinidad and Tobago (2012) *Annual Report 2011*

¹⁷ *Ibid*

¹⁸ *Ibid*

• Corporate Membership	\$ 500.00 (US\$78)
• Association Membership	\$ 250.00 (US\$39)
• Junior Membership	\$ 20.00 (US\$3)
• Family Membership	\$ 100.00 (US\$16)
• Life Membership	\$ 500.00 (US\$78)
• Visiting Membership	\$ 50.00 (US\$8)
• Honorary Membership	Free

The Trust currently has a membership of 692 persons comprising mainly ordinary members. The membership offer is cause-based, although membership does also open the door to lectures and heritage tours.

According to its membership recruitment leaflet:

“The Trust relies on membership subscriptions to provide a significant amount of the money it needs to look after our heritage sites. By becoming a member, you will be supporting the idea that safeguarding our heritage enhances our country and the quality of life for all Trinidadians and Tobagonians. Through your participation, we can support local and national preservation efforts. As a member, you’ll help communities like yours across the country save what makes us unique.”¹⁹

In 2011, the National Trust had 560 members and membership fee income was TT\$9,620 or just over 1% of the organisation’s total annual income.

e) *Research*

The Trust has created an inventory of three hundred and six properties of interest from both Trinidad and Tobago. These sites are considered part of the built and natural heritage of the people of Trinidad and Tobago and include architectural monuments, colonial fortifications and natural sites such as savannas, wetlands and forest reserves.²⁰

f) *Publications*

In 2012, the National Trust published its first major publication, *The Built Heritage of Trinidad and Tobago*. Researched and written by Geoffrey MacLean, the book was commissioned in celebration of the country’s 50th Anniversary of Independence and encapsulates 50 sites of historic importance. The Ministry of Education has recognised the importance of this publication and has ordered a quota for schools and libraries across Trinidad and Tobago.²¹

A further compilation is planned for next year, along with additional publications such as a newsletter. A wider communications audit would be helpful at this stage to understand the impact of new technologies on the Trust’s communications and the need for additional publications, a dedicated website or magazine alongside existing social media and lectures.

g) *International networking*

The National Trust pays Trinidad and Tobago’s contribution to UNESCO’s World Heritage Fund and has also applied to join INTO, the International National Trusts Organisation.

¹⁹ Join Today leaflet

²⁰ National Trust of Trinidad and Tobago (2012) *Annual Report 2011*

²¹ http://www.trinidadexpress.com/featured-news/_Built_Heritage__from_the_National_Trust-184195401.html

Ms Roberts shared at the workshop that she had recently returned from an event hosted by the Organisation of American States in Barbados and was 'totally embarrassed' by the state of architectural heritage protection in Trinidad and Tobago.

She explained that Magnificent Seven had been officially declared as a Heritage Site District by the Organisation of American States, but that Mille Fleurs was only being held up by termites holding hands! "It is part of our history. It is part of where we come from. We are a callaloo people. It is our people who built these buildings. We must preserve them," she added.²²

2.4 Governance Structure

a) *Organisational structure and reporting lines*

The two members of staff, Research Assistant and Office Manager, report to the Chairman. A Heritage Adviser is also employed. Once new office space is acquired, it is anticipated that a significant number of staff vacancies will be filled.²³ (According to Minister de Coteau, this will be imminently forthcoming in the refurbished Fort St. Andres.)

The Chairman reports to the Minister of National Diversity and Social Integration and the National Trust is seen by many as a subsection of the Ministry. In the National Trust Act, however the Trust is deemed to be a 'charitable institution of a public character'.

b) *Board and Committees*

The Chairman presides over an eleven member Council. Six of these are appointed and five are elected by the membership, although there seems to be a lack of transparency about this process.

Of the six appointed members, three are supposed to represent 'associations, agencies or institutions which have among their stated objects, objects which are similar to the purposes of the Trust'.²⁴ Again, there was some uncertainty around who represented what, which it would be helpful to clarify. The names of the organisations represented should be included in the Annual Report²⁵ and regular reviews of appointing bodies should be undertaken, as the needs and focus of a Trust changes over the years.

Appointed members of UK National Trusts – two different approaches

A similar arrangement exists at the National Trust of England, Wales and Northern Ireland where half of the members of its 52-person Council are nominated by 'appointing bodies'. Appointing bodies are organisations that are deemed to be relevant to the work of the Trust. The Blakenham review of 2002-03 recommended maintaining this arrangement which, it considered, reflected the interests that the wider nation had in the National Trust. It is understood, however, that the appointees do not carry any representative responsibilities and once they are appointed their organisations have no power to direct the manner in which those members participate in Council business or to rescind their appointment. The list of appointing bodies is reviewed every six years to assess their relevance and appropriateness.

²² <http://www.newsday.co.tt/hotline/print,0,178095.html>

²³ National Trust of Trinidad and Tobago (2012) *Annual Report 2011*

²⁴ National Trust Act no. 11 of 1991 (amended by Act, No 31 of 1999) 12 (4)

²⁵ Appointing bodies to the Jamaica National Heritage Trust are listed in their Act 3.2 http://jnht.com/jnht_act_1985.php

In Scotland, however, the Reid review of the National Trust for Scotland came to the view that Council Members (now known as Charity Trustees) should not be representatives of other bodies. Reid recommended therefore that the practice of appointing representative members should come to an end. The review considered that whilst it had been appropriate to provide external organisations with a voice in the direction of the Trust in the 1930s, when the Trust was building heritage capacity across Scotland, there were better ways for ensuring co-ordination, expert advice and policy development at a national level. For example, the review suggested that the Trust should engage in policy development and partnership working with non-governmental organisations in the private and voluntary sectors.

Given that the Council had the power to change the list of bodies represented, the Reid review proposed that all of the bodies should be removed from the list. This was agreed by Trust in 2010.

Under UK Charity Law, those post holders have liability as Charity Trustees.²⁶

The Council Members of the National Trust of Trinidad and Tobago are remunerated for their attendance at monthly Council Meetings in accordance to a Group C state board. Payments to members are as follows: chairman \$6,500, deputy chairman \$4,800 and directors \$3,200. Members are also entitled to a travelling allowance—chairman—\$1,000, deputy chairman—\$750 and directors—\$500. Making a yearly total of \$275,650. The total spend on ‘Directors Fees and Travel’ in 2011 was \$476,650. The budget for 2013/14 is \$556,200.

The Council Members meet once a month with the Minister. Until now, the voice of the staff has not been heard at these meetings.

There are a number of sub-committees, including Archaeological, Awards (biennial), Built Heritage and Membership Activities, and an interest evidenced at the workshop amongst the National Trust membership at large to get involved.

c) Role of membership and membership benefits

Neither the Act nor the membership leaflet, Join Today, appear to spell out the benefits of joining the National Trust.

According to the National Trust Act, any financial member of the Trust may be nominated for election to the Council. The nomination paper needs to be signed by not less than five financial members of the Trust and shall be left with the Secretary not later than June 15, preceding the date of the meeting.²⁷ There does not seem to be a provision for the making of member resolutions.

The National Trust Members encountered at the workshop seemed very committed and there is an opportunity to build on their engagement.

d) Staffing

During the workshop it was noted that the Trust employs 2½ members of staff – the Research Assistant, Office Manager and Heritage Advisor. The 2013/14 budget assumes the filling of the following positions:

- Legal Officer
- Accountant

²⁶ http://www.scottish.parliament.uk/ResearchBriefingsAndFactsheets/S4/SB_13-09.pdf

²⁷ National Trust Act no. 11 of 1991 (amended by Act, No 31 of 1999) First Schedule # 9

- Education Officer
- Information Technology Officer
- Senior Researcher
- Communications/Events Co-ordinator
- further Research Assistants
- Administrative Support Officer
- Clerical Assistant
- Driver

e) *Volunteers*

There seems to be a number of volunteers in the mix, including the members of Council, although given their remuneration as Group C Board members, it is questionable whether they count as true volunteers.

In contrast, the CfC is completely run by volunteers.

f) *Strategy*

A strategy document has not been made available although the 2013/14 budget document does include the following list:

The major proposed activities of the Trust for 2012/2013 [sic] are as follows:

1. Monthly Heritage Lecture Series
2. Quarterly Heritage Tours
3. Overseeing the restoration of Heritage Sites
4. Listing of several Properties of Interest
5. Promotional Programmes for increased membership
6. Publications Programme – newsletter, newspaper articles and magazine features
7. Implementation of community heritage programmes by encouraging historic preservation projects in communities
8. Travelling exhibitions on well known landmarks
9. A Heritage Preservation conference/forum
10. Publication of a Natural Heritage compilation
11. Office relocation
12. Establishment of a Heritage Preservation Fund
13. Increasing of the efforts and work of the Archaeological sub-committee
14. Employment of additional staff (subject to successful relocation plans).

g) *Accountability*

The process of performance measurement within the Trust is unclear.

h) *Civil society and private sector connections*

As the Trust was established through an initiative of the Citizens for Conservation, one might imagine that good relations existed with civil society, however it appears that this is not the case with CfC, which recently reconstituted itself having felt that that National Trust was not making the progress it had hoped for.

The overwhelming feeling at the workshop, which included representatives from a number of civil society groups, was that whilst there was great interest in the mission of the Trust, people had lost confidence in its ability to deliver.

i) *Links with government*

The Trust is a unit of the Ministry of National Diversity and Social Integration and therefore has very clear links to government. However, the impression given is that the Trust is not empowered to challenge decisions by government departments, or even by its own line Ministry.

2.5 Resources

a) *Land holding*

As noted, the Trust does not own any property in its own right, although that is within its remit. Nelson Island is 'under the jurisdiction' of the Trust, but not in its ownership.

Many Trusts around the world are struggling to maintain large property portfolios and one could argue against an ownership model for that reason. It would certainly be unadvisable for the Trust to be liable for the conservation costs at properties it is listing²⁸. In the UK, country houses were given to the National Trust with substantial endowments (see Appendix 2 for the Chorley Formula used by the National Trust to calculate property endowments) and this is the same in other countries, such as Italy. Trusts need to be extremely selective about accepting properties without a sufficient endowment to cover repair, maintenance and operations.

Protection through ownership feels financially prohibitive at this stage, unless the government hands over property to the Trust. But where will the funds come from for future acquisitions?

Ownership model

The Indian National Trust for Art and Cultural Heritage is not a property-owning Trust and instead focuses on education (INTACH runs Heritage Clubs in 1,500 schools), outreach (over 170 Chapters or volunteer groups) and providing expertise for collaborative projects (INTACH has MOUs with 17 state governments and has entered into several Public-Private-Partnerships). Neither does the National Trust for Historic Preservation in the US concentrate on ownership, although it does care for and open to the public a number of historic sites, its activity centres on national level policy, research, advocacy, and outreach.

b) *Revenue sources*

The Trust receives most of its income from the government, in the form of an annually agreed subvention of around \$1,000,000 (US\$155,000).

In 2011, 95% of the Trust's income came from government sources, with the remainder being membership fees and income from heritage tours.

c) *Financial independence*

Diversifying sources of income is essential to the Trust's future, which is recognised by the Council in the budget it set for 2013/14:

The area of finance is critical for the development of the Trust. The Trust must work towards increasing its revenue and becoming less dependent on government funding. Under the

²⁸ National Trust Act no. 11 of 1991 (amended by Act, No 31 of 1999) 26 1)

provisions of the National Trust Act no. 11 of 1991 (amended by Act, No 31 of 1999) the funds of the trust shall consist of:

- All monies received by the Trust out of monies appropriated by Parliament for the purposes of this Act;
- Monies earned or arising from assets acquired by or vested in the Trust;
- Gifts, bequests, devises, donations and subscriptions by persons, organizations, groups or institutions;
- All other sums, which may in any other manner, become payable to or vested in the Trust in respect of any matter incidental to its powers and functions.

Also, the Trust may with the approval of the Minister, borrow sums required for meeting any of its obligations or discharging its functions. At this early stage of its development, though, the Trust will require significant appropriation from government.²⁹

d) Number of members and volunteers

The Trust has 692 members.

e) Key expenditure items

As previously noted, the main item of expenditure is Directors fees and travel (\$476,650 in 2011), followed by Tours (\$174,935) and Lectures (\$160,968).

A step-change is needed to redeploy the limited resource spent talking about the Trust (Council Meetings) and outreach (this is worthy but needs to be part of the bigger picture) to focus on tangible conservation outcomes.

²⁹ National Trust budget document 2013/14

3. Workshop outcomes and comparative analysis

As the workshop notes run to some sixteen pages, the salient points are included below, some of which have been included in the overall recommendations.

All participants seemed to welcome the opportunity to be involved in this collaborative process and rose to the challenge of identifying problems and suggesting ways to address them. There was a frank airing of views but also a building of common cause and a definite feeling of 'Yes we can!'.

Minister de Coteau set the scene with his opening remarks, describing his intrinsic pride and wonder as a teacher, historian, cultural enthusiast and photographer. "I feel disheartened when I gaze on the not-so-Magnificent Seven on the Savannah. Mille Fleurs, which is now owned by the State, is now in a pathetic dilapidated state", de Coteau said. He added that once the Ministry acquires the Historical Restoration Unit, Mille Fleurs will be the first priority.³⁰

There were many comparisons made to other countries in the Caribbean and a determination to catch up with them – and indeed, overtake!

During the course of the workshop, the following major themes emerged:

- Governance and administration
- Financing and resources
- Outreach and education

3.1 Governance and administration

a) *What is a National Trust?*

The role of 'National Trusts' is to preserve heritage in all its forms and to include people in the process. Some organisations concentrate mainly on preservation and interpretation while others focus on education, public awareness, activism and broad project management/coordination. Some characteristics of a National Trust are:

- independence of government
- classification as a charity or foundation
- community based
- broad constituency or membership
- site management or stewardship
- profile raising and education role
- civic engagement

b) *Trinidad and Tobago National Trust Act*

There were concerns about the National Trust Act, particularly how to reconcile the tensions between the Trust's function as both regulator and charitable body. One workshop group suggested splitting the organisation along these lines so that the charitable side could be completely independent of government.

There are frustrations with the way the Act is being implemented, which are understandable given the considerable lengths some of the CfC team went to in securing its initial enactment.

³⁰ <http://www.newsday.co.tt/hotline/print,0,178095.html>

Certainly, clarity is needed as to the Trust's status and relationship with its parent Ministry. Many would like the organisation to be much more independent.

National Trust of South Korea

A few years ago, the Korean National Trust, a grassroots ngo, lobbied successfully for a National Trust Act on the basis that it would strengthen their organisation and the citizen-led heritage conservation movement. But in the end the entities were not able to reconcile their differences and Korea ended up with no less than three 'National Trusts', the original ngo and two government bodies, one covering natural heritage, one covering the built environment and all with very similar objectives.

Some overseas Trusts have close connections with government and many Trusts in the Caribbean are effectively QUANGOs. Interestingly, the National Trust of Fiji has moved around various Ministries and now resides with the Ministry of Education.

National Trust of Fiji

The National Trust of Fiji (NTF), a statutory body funded jointly by the Fiji Government, independent donors and multi-lateral projects, was established in 1970 to provide for the protection of Fiji's natural, cultural and national heritage.

The NTF currently protects a total of 14 heritage sites within the Fiji islands. Of these 14 sites, five are natural and four are cultural, while the remaining five are community conservation projects facilitated by the NTF. The legislative mandate for the NTF lies with the

- National Trust Act (Cap 265) of 1978 NTF Act Cap 265
- Fiji Government's National Heritage Policy in 1996
- National Trust Amendment Act of 1998 NTF Amendment Act

In 1999, with the establishment of the Department of Culture and Heritage, the NTF, together with the Fiji Museum and the Fiji Arts Council, became key organisations for the newly formed department. The Department was then under the portfolio of the Minister for Women, Culture and Social Welfare. In September 2001, the department was moved under the portfolio of the Minister for Tourism, Culture and Heritage, and Civil Aviation.

However in August 2002 the department was moved again to the Ministry of Fijians Affairs. This partnership remained until January 2008 when the department was again moved under the portfolio of the Minister for Education, where it currently remains.

The NTF is governed by a Council elected by the Minister for whichever Ministry it belongs to.³¹

New Zealand Historic Places Trust Pouhere Taonga (NZHPT)

The New Zealand Historic Places Trust Pouhere Taonga manages a large number of heritage buildings and sites around New Zealand, many of which are open to the public. It also compiles the national schedule of New Zealand's treasured heritage places (listing). However, the NZHPT is an autonomous Crown Entity, is supported by the Government and funded via *Vote Arts, Culture and Heritage* through the Ministry for Culture and Heritage.

³¹ <http://www.nationaltrust.org.fj/aboutus.html>

A recent review of the NZHPT, originally established in 1955 and now recognised as Government's respected adviser on historic heritage matters, made certain changes to the existing legislation, including:

- change the name of to “Heritage New Zealand Pouhere Taonga” (“Heritage NZ”) to remove “confusion as to the organisation’s legal status as a Crown entity (and not a trust)”;
- to “resolve” tensions caused by a combination of “statutory responsibilities, active branch committees, and elected board members”, the Bill changes the structure set out in the 1993 Act (which provides for a board, the Māori Heritage Council, and branch committees comprising fee-paying members) to disestablish the branch committees, remove three positions for elected board members, and to create two new positions for board members appointed by the responsible Minister, but to continue the Māori Heritage Council;
- combines the two existing archaeological authority processes to form a single process for consenting in situations where archaeological sites may be harmed, reduces the maximum time frames to process applications, introduces a “simplified application process for proposals that have a minor effect only on archaeology, reducing requirements on applicants”;
- enables Heritage NZ the ability to “process archaeological authorities more speedily following a state of emergency”;
- enables vexatious applications for registration of historical and cultural heritage sites that do not meet statutory criteria or definitions to be rejected; and
- increases the maximum level for monetary penalties³²

The example from New Zealand above shows that some entities have sought to align themselves even more closely with government. In this case a change of name also helping to eliminate misunderstandings as to the organisation’s status alongside a simplified listing process and increased monetary penalties, which all feel rather familiar ...

Listing historic buildings in England

Interestingly the listing process in England is fairly straightforward. Anyone can apply for a building to be listed by completing an on-line application form (with sections on type of listing, location, extent, ownership and occupancy, planning, reasons, threat, photographs and other uploaded documents. As English Heritage receives a lot of applications for designation and has to direct its finite resources to those places that are in most need of attention, it only takes forward applications for designation where the building or site:

- Is demonstrably under serious threat of demolition or major alteration
- Is a Designation Department priority under the National Heritage Protection Plan, English Heritage’s programme of strategic work
- Possesses evident significance, and is obviously worthy of inclusion on the National Heritage List for England³³

Before launching into a full-scale re-write of the Trinidad and Tobago National Trust Act however, the Council and line Ministry should review understanding of the Act and ensure

³² <http://www.parliament.nz/NR/rdonlyres/60E5D81F-9138-4B00-9C59-C60F7B79816D/208396/1933HeritageNewZealand1.pdf>

³³ <http://www.english-heritage.org.uk/professional/protection/process/online-application-form/>

that the organisation's current processes are compliant with it. Fine-tuning may well be needed in the long term, but a first step would be to ensure that the Act is being followed. Particular areas of concern were:

- The election/appointment procedure of Members of Council
- The functions of the officers of the Trust listed in the First Schedule, which describe the roles of the Chairman, Secretary and Treasurer
- The Chairman's role having developed into one of Executive Chairman or CEO
- Board terms limited to two consecutive terms of three years
- The perceived level of authority of the Minister over the Council
- Accountability (the Act states that Council members are not personally liable³⁴ – unlike Charity Trustees generally – which begs the question, who is being held accountable?)³⁵
- Which appointing bodies nominate Council members
- Levels of financial penalties and membership fees

What's in a name: Is English Heritage a more analogous model than the National Trust?

English Heritage is an executive non-departmental public body of the British Government sponsored by the Department for Culture, Media and Sport (DCMS). By advising on the care of the historic environment in England, English Heritage complements the work of Natural England which aims to protect the natural environment. It has a broad remit of managing the historic environment of England and advises the relevant Secretary of State on policy and in individual cases such as registering listed buildings and scheduled ancient monuments.

It was set up under the terms of the National Heritage Act 1983. Its functions for maintaining ancient monuments had previously been undertaken by part of the Department of the Environment which was the successor to the Ministry of Works.

English Heritage's best known role is as the steward of over 400 significant historical and archaeological sites, from Stonehenge to the world's earliest iron bridge. It has direct ownership over some historic sites and also liaises with private owners of sites that are managed under guardianship arrangements. It has major responsibilities in conservation, giving advice, registering and protecting the historic environment. It also maintains a public archive, the English Heritage Archive, formerly known as the National Monuments Record (NMR). Its role is in:

- Directly managing the national collection of sites, monuments, archive records and photographs taken into state care since the 1880s.
- Giving grants national and local organisations for the conservation of historic buildings, monuments and landscapes. In 2010/11 it made grant offers worth £34.8 million (US\$54m) to support heritage buildings.
- Advising central UK government on which English heritage assets are nationally important and should be protected by designation (i.e. listing, scheduling etc.). In 2009-10 it advised on about 2,000 requests for listing, and processed 14,072 applications affecting Grade I and II* listed buildings, 97% of which were dealt with within the agreed deadline. In 2010-11 the annual report states that it was consulted on 17,302 planning cases.
- Administering and maintaining the register of England's listed buildings, scheduled monuments, registered battlefields, conservation areas and protected parks and gardens. This is published as an online resource as 'The National Heritage List for England'.

³⁴ National Trust Act no. 11 of 1991 (amended by Act, No 31 of 1999) 26 1) 15 A

³⁵ <http://www.guardian.co.tt/news/2013-03-07/don%E2%80%99t-blame-national-trust-%E2%80%98weaknesses%E2%80%99-says-lewis>

- Administering the Blue Plaques scheme in London since 1986.
- Advising local authorities on managing changes to the most important parts of heritage.
- Providing expertise through advice, training and guidance to improve the standards and skills of people working in heritage, practical conservation and access to resources. In 2009-2010 it trained around 2,500 professionals working in local authorities and the wider sector.
- Consulting and collaborating with other heritage bodies, local and national planning organisations e.g. the preparation of Planning Policy statement for the Historic Environment
- Commissioning and conducting archaeological research, including the publication of 'Heritage Counts' and 'Heritage at Risk' on behalf of the heritage sector which are the annual research surveys into the state of England's heritage.
- It is not responsible for approving alterations to listed buildings. The management of listed buildings is the responsibility of local planning authorities and the Department for Communities and Local Government.

English Heritage received seed funding from Government and now is financed through grant funding from Government and earned income. It receives funding from the Department of Culture, Media and Sport. Membership income is its largest share of earned income (34.3% of total), followed by admission income (26.1% of total).

c) *Leadership*

During the workshop the Trust's leadership was portrayed as neither particularly credible nor trustworthy. It was felt that proper accountability was lacking and many at the workshop believed that the National Trust Council had been discredited. There were vociferous calls for the immediate replacement of the Chairman.

It would certainly be good practice to have in place a performance measurement system for Trust staff, Council and officers.

National Trust Council Members

The most comprehensive governance guidance can be found in the National Trust (for England, Wales and Northern Ireland)'s Governance Handbook, which acts as a single reference point for all those interested in how the Trust is run. Council members, who are all volunteers, are appointed or elected for three-year terms after which they are eligible for re-election or reappointment. Together they provide a breadth and depth of knowledge and understanding of the kinds of issues that the Trust faces. They also provide a wide range of perspectives against which Trust policies and proposals can be tested. All governance volunteers are unpaid, although expenses are reimbursed.

The National Trust of England, Wales and Northern Ireland describes the role of its Chairman thus:

- To lead and direct the Council to ensure that it works well and fulfils its responsibilities of governance of the organisation
- To promote the highest standards of corporate governance and ensure the effective implementation of decisions of the Board of Trustees and Council
- To assist the Director-General, providing support and advice and helping him/her to implement the policies and strategies set by the Council whilst respecting executive responsibility
- To optimise the relationship between the Council and the senior staff and volunteers
- To ensure communication between the members and the Council

- To represent the Trust at public events

Like at the Trinidad and Tobago National Trust, the main tasks of the Chairman are to chair the AGM and chair meetings of the Council, ensuring that business is dealt with properly, that the Council functions effectively and carries out the duties set out in its terms of reference.

He/she is also responsible that the performance of individual Council Members, and of the Council as a whole, is evaluated once a year.³⁶

The workshop recommended that Council members with a wide range of experience were needed, but that the essential ingredient, for both the Council and staff, was a passion for heritage conservation.

Trustees of the National Trust for Historic Preservation

The NTHP Board of Trustees includes a former mayor and diplomat, an investment banker, former First Lady (Laura Bush), several real estate developers, a curator, a newspaper editor, environmentalists, a singer (Gloria Estefan), an author, a lawyer, a community development consultant, an architect, several historians and art historians, an actress (Diane Keaton), a farmer, a McKinsey Director, a preservation planner, a broadcaster, a fund manager and a venture capitalist.

With little money at present to employ staff, the Trust needs to build its volunteer base, not least to spread the load for the overworked small nucleus of Council. Advice received from the St Lucia National Trust was to involve more everyday National Trust members on sub-committees or to develop a network of local delegations with the aim of growing volunteerism. There was certainly enthusiasm in the workshop room which could be harnessed. However, decentralisation highlights the need to keep ambitions clear and simple so that everyone knows their role and what they are working to achieve.

d) Internal organisation

That the Trust is understaffed is plain to see, but what is perhaps less plain is the amount of money that is spent on Council meetings. It was felt that a proper administrative structure was needed so that the Council was not called upon to perform staff functions.

No organisation can prosper without having the right people in place doing the right things at the right time. However, these days with personnel – volunteers and staff – being expected to perform a variety of tasks, wearing a number of different hats and thinking ‘outside the box’, lines of responsibility and accountability can become blurred. Real accountability occurs when people throughout the organisation believe that what they do matters and when they have a degree of control over their own success, which is recognised and rewarded.

It is not possible to ‘make’ people accountable, but it is possible to make accountability a more compelling offer through communicating the importance of people’s work (volunteers and employees) and by structuring work in such a way that people have more control over whether they succeed or fail.³⁷

Linked to the above is the development of a three to five-year plan. It does not need to be complicated. In fact, the workshop has kick-started the planning process as it highlighted

³⁶ National Trust (2009) *Governance Handbook* <http://www.nationaltrust.org.uk/document-1355766946577/>

³⁷ http://www.paulglen.com/how_to_make_your_people_accountable.html

some of the opportunities and challenges the Trust faces, awareness of which should enable the organisation to better deliver its objectives.

It is not possible to tackle the questions of direction, funding, staffing or volunteer participation without first having a mission that is clear, relevant and backed up by a plan. There are lots of different approaches to strategic planning, which those involved with the Trust will no doubt be familiar with. Assistance with strategic planning in a National Trust context is something INTO can help with if needed.

The National Trust of England, Wales and Northern Ireland's Strategy Wheel could be a useful tool for grouping the plan objectives under the headings – conservation, engaging supporters, financing the future and investing in people – and we have examples of strategic plans from across the INTO network.

America's National Treasures

The main framework for the NTHP's activities since 2011 has been a campaign to focus on America's "National Treasures" at risk of being lost due to neglect, closure, demolition, lack of funding, deterioration, insufficient protection or inappropriate development. This new preservation strategy incorporates public advocacy, legal actions, adaptive re-use, public engagement, and profile diversity. The answer to the loss of national treasures is not always a financial one, but other means of preservation are explored and the raising of capital to fund restoration projects is kept as one avenue, but not the only avenue of a long-term development scheme.

St Lucia National Trust – Our Strategy for 2010 to 2020

"We aim to build greater support for our ongoing conservation work and campaign on key issues to champion the cause of heritage conservation in Saint Lucia. To do this we must continue to develop and manage our properties to the highest standards in both conservation and customer care and work to ensure that people not only recognise our name, but also understand the full scope of our activities, including education and advocacy on the conservation of our heritage. We must also develop the Trust into a stronger and more financially stable organisation, developing our staff and volunteers to help them take on the challenges that face us. In managing our assets, including our people, properties and resources, we will aspire to best international standards and will champion creativity and innovation in all our activities.

The Plan shows how we will build greater support for our ongoing conservation work and campaign on key issues to champion the cause of heritage conservation in Saint Lucia. Our objectives are summarised as:

- Deliver core conservation work to the standards of our Conservation Principles;
- Inspire the widest possible audience to join the Trust, to enjoy Trust properties, and to support our conservation values;
- Champion the cause of Saint Lucia's heritage and build awareness of the full range of our activities; and

Develop our culture, systems and skills to operate more effectively, efficiently and sustainably."³⁸

³⁸Chase, Vasantha (2009) *Protecting Fair Helen's Patrimony: Our future plans April 2010 to March 2020* St Lucia National Trust

3.2 Financing and resources

Everyone agreed that the Trust does not have sufficient resources (funds, manpower or skills) to do the job that people were expecting it to do. TT\$1,000,000 (circa US\$155,000) per annum is simply not enough to run an organisation tasked with such a broad remit. That around half its budget is spent on Council meetings seems excessive when in other countries, individuals fulfil these roles on a voluntary, non-remunerated basis.

a) *Fundraising*

The Trust appears to have had limited fundraising success thus far. A fundamental challenge is that, as long as the National Trust of Trinidad and Tobago is *perceived* to be an arm of government (despite claims that it is a substantially independent and autonomous body), it will struggle to raise funds from donors or foundations.

It is not insurmountable however and other Trusts are able to fundraise for both projects and core costs, using a mix of public and private sources. The business plan needs to focus on the required size of endowment or seed money, how to generate additional income from diverse sources and how to protect and grow any investment fund.

Funding the National Trust of New South Wales

The Trust has received substantial Government funding since 2001, to enable major works to be carried out on more than 14 properties. But for some time funding support from bequests has been decreasing, and there is an increasing backlog of high-cost conservation works. Whilst the Trust may be considered self-financing, it is currently operating at a loss (AUD 1.6 million (US\$1.4m) in 2011). In order of magnitude, the main revenue sources (as at 2010) are: gains on disposal of assets (23%); grants from Government (14%); bequests (14%); bushland management income (12%); fundraising and event income (6%); gains on revaluation of investment (6%); membership income (5%); merchandising (5%); investment income (4%); sponsorship (3%); museum visitation (3%); donations (3%); gain on revaluation of assets (1%); and conservation services (1%).³⁹

Others have stepped away from state funding to maintain their independence.

National Trust for Historic Preservation

When founded by Congress in 1966, the NTHP did receive state funding, however all government subsidies ceased in 1998. Now the majority of funding (57%) comes from private donations and contributions.

Then President, Richard Moe, said "Congress had us in its sights. It was taking a very hard look at all federally funded cultural programs and we got caught up in that. In the end, we decided to chart our own course and not be overly dependent on Congress or any other single source of income. This also made us a much more effective advocate in Congress, a much more credible advocate for preservation issues, instead of just being up there as a special pleader for our own funding, which always troubled me.

Today, when we go up to the Hill, we are not seeking funds for ourselves, but rather we are seeking funds for the national parks or for historic tax credits or for cultural resources on public lands in the West. In the end, this decision changed our culture. We became much more entrepreneurial and creative and energetic after we went off federal funding. We

³⁹ Study on the Feasibility, Framework and Implementation Plan for Setting up a Statutory Heritage Trust in Hong Kong, Final Report published by GHK, April 2013

increased our foundation funding almost 600 percent.”⁴⁰

Remaining operating revenues today are: 20% Contract services, Article sales, Advertising; 13% Royalty, Rental and Other income; 9% Admissions and Special events; 4% Investment income; 3% Membership dues; 2% Grant income.

There is a lengthy tradition of philanthropy in America and the generosity of individuals, corporations and foundations makes the work of the NTHP possible. Within each Annual NTHP Report, there is an extensive list of donors highlighting the importance of each contribution. In a similar vein to the Trusts in the UK, there is also a tradition of legacies.⁴¹
Barbados National Trust

The Barbados National Trust, much applauded during the workshop, receives an annual government subvention of BB\$420,000 (circa US\$210,000) which it uses to support its work at nine major visitor attractions and yet it is perceived to be at arm’s length of government. There are over 500 charities in Barbados, many receiving state support, which demonstrates that the government is not averse to outsourcing to civil society.⁴²

The Trust’s annual subvention has been approved until 2016, which must be an enormous help for financial planning. It is recommended that the National Trust of Trinidad and Tobago likewise moves onto a longer budgetary period.⁴³

There is some work to be done to convince the public that the National Trust is a worthwhile cause, but outreach and engagement go hand in hand, so a major capital campaign could be complemented by positive messaging about the work of the Trust.

b) Endowment fund

The workshop explored the idea of a growing an endowment or Trust Fund. Delegates also considered how the National Trust might tap into the existing Green Fund, or whether a separate ‘Heritage Fund’ or ‘Red Fund’ might be established.

The Green Fund was established in 2001 under the Miscellaneous Taxes Act, Part XIV- Green Fund Levy, by the Trinidad and Tobago Government. This structure accumulates funds by a 0.1% Green Fund Levy imposed on gross sales or receipts of companies carrying on business in the country. The fund was established with the purpose of financially supporting remediation, reforestation and conservation activities undertaken by local organizations and community groups; and as of January 2012 had an estimated TT\$2.7 billion available for these purposes. The policies guiding the use of this fund include the National Environmental Policy, the Medium-Term Policy Framework 2011-2014, and other relevant international and regional environmental/ development commitments such as the UN Millennium Development Goals.⁴⁴

Belize’s National Trust

The Protected Areas Conservation Trust (PACT) is Belize’s National Trust. PACT provides funds for supporting conservation and promoting environmentally sound management of Belize’s natural and cultural resources to foster sustainable development. PACT is a bold

⁴⁰ <http://www.preservationnation.org/magazine/2010/may-june/moe-interview.html>

⁴¹ Quoted in Nordstrom (2013) *Ibid*

⁴² Carmichael, Trevor A. (2004) *Charity Law Development in the Commonwealth Caribbean in The Tax Treatment of Ngos: Legal, Ethical and Fiscal Frameworks for Promoting Ngos and Their Activities* p71

⁴³ <http://barbadosparliament.com/htmlarea/uploaded/File/Budget/Draft%20Estimates%202013-14%20.pdf>

⁴⁴ Mahung, Karena (2013) *A preliminary study into the framework of conservation easements and its application as a private lands conservation strategy in Trinidad and Tobago* BSc Environmental and Natural Resource Management, UWI

and innovative strategy for non-traditional revenue generation. PACT is primarily financed from the collection of a conservation fee of BZ \$7.50 (US \$3.75) paid in by visitors to Belize upon their departure and a 20% commission from cruise ship passenger fees. No less than 5% of all revenues are deposited into an endowment fund. PACT also welcomes donations by individuals and corporations.

PACT was established in 1995 as a statutory body after several years of consultation and meetings with various non-government organizations, government departments, private sector and international conservation organizations. Having been formally endorsed through the USAID's project in Belize on developing a National Protected Areas System Plan (NARMAP 1995), PACT opened its doors in June of 1996.

PACT started with an initial support amounting to BZ \$72,000 from the United States Agency for International Development (USAID) through NARMAP and has grown to a BZ \$5 million fund today.⁴⁵

c) *Financial instruments for heritage protection*

Linked to this was a discussion about tax incentivised giving. There was quite a lot of confusion around giving to charity, which caused a reflection that perhaps the people in the room were not accustomed to making such charitable donations?

The National Trust is an organisation approved as Charitable Body by the President of Trinidad & Tobago under Section 6 (1) (g) of the Corporation Tax Act Chapter 75:02. A tax deduction is allowable for any person making a contribution to such a charitable fund by means of a covenanted donation. The tax deduction is equivalent to the amount donated but limited to 15% of total Annual Income. Deeds of Covenant need to be approved by the Board of Inland Revenue.⁴⁶

Tax relief does generally encourage donations from the private sectors, and that governments wish to encourage the donation of resources to civil society organisations is understandable, given that they contribute in such a tangible way to the development of social capital, even though straight tax relief is neutral to the donor and biased against the government.

Another way for civil society to help revitalise historic areas and neighbourhoods, providing affordable housing and demonstrating the economic and social benefits of historic preservation is a revolving fund.

A preservation revolving fund is a pool of capital created and reserved for a specific activity with the restriction that the monies are returned to the fund to be reused for similar activities. An organisation typically imposes preservation easements or covenants on properties sold through the fund⁴⁷. Many of the first revolving funds started by purchasing one building in response to a specific crisis. Today, revolving funds are most often used strategically to accomplish specific preservation objectives. Some organisations use their revolving fund programmes to stimulate revitalisation in low- and moderate-income historic neighbourhoods. The acquisition and resale of historic properties is a significant responsibility for a preservation organisation to take on.⁴⁸

⁴⁵<http://www.pactbelize.org/AboutPACT.aspx>

⁴⁶ Deed of Covenant Section, Inland Revenue Division http://www.ird.gov.tt/load_page.asp?ID=32

⁴⁷ See Karena Mahung's report on the use of conservation covenants or easements in Trinidad and Tobago

⁴⁸ Preservation Revolving Funds, Preservation Books, National Trust for Historic Preservation, p1

National Trust for Scotland's Little Houses Improvement Scheme

The Little Houses Improvement Scheme (LHIS) was launched in 1960 with a premise 'to restore houses of character for re-sale' across Scotland. Essentially, the LHIS buys neglected or dilapidated historic buildings, then restores and sells them on in order to promote their regeneration and renewal as well as the communities in which they are situated.

The introduction of the scheme was a natural progression from the pioneering restoration projects that the National Trust for Scotland had been embarking on across several historic burghs throughout Scotland since the early 1930s. Since the creation of the scheme, the LHIS has been internationally recognised as a pioneer and inspiration to other comparable building preservation initiatives across the UK.

Without the intervention of the LHIS, many historic and beautiful small dwellings dating from the 16th, 17th, and 18th centuries, as well as the character of many historic burghs, would not have survived the modernisations of the 20th century which saw the wholesale destruction of much of Scotland's historic built environment.

d) Other sources of income

It was felt that the Trust needed to diversify its income sources. At present, the more likely possibilities are through fundraising, corporate sponsorship (Bermuda and Jersey National Trusts both do this very well), grant funding, membership and other activities (tours currently run at a loss but this could be turned around). Once the Trust is opening properties to the public, retail, catering and the leasing of property are potential sources of income.

Jamaica National Heritage Trust

The Jamaica National Heritage Trust (JNHT) intends to divest, by way of lease, heritage sites to private stakeholders to create practical and sustainable heritage based business ventures, while maintaining the integrity of the sites through their rehabilitation, restoration and/or general preservation. The JNHT has invited expressions of interest in creating business proposals for these sites. It will be worth watching how this programme develops.⁴⁹

A high-level patron was considered desirable to help with fundraising, as was the establishment of a Friends Group, possibly also in other countries such as the US and/or UK, which many National Trusts have established to incentivise giving.

An increase in membership fees was also mentioned as was Lottery funding. In the UK, the Heritage Lottery Fund has been a good source of funding for the National Trust as is the Postcode Lottery in the Netherlands which supports INTO members the Gelderland Trust.⁵⁰

Turning around the finances of the National Trust for Scotland

The National Trust for Scotland was forced to embark on a swingeing programme of cuts three years ago after its cash reserves slumped to just £3.1 million (US\$4.8m) – £14m (US\$22m) lower than they should have been. Just two years ago its chief executive, Kate Mavor, was warning that the trust was "living beyond its means" after agreeing to take on too many properties and sites over the years.

⁴⁹ Facebook post, 1 May 2013

⁵⁰ <http://www.postcodeloterij.nl/Organisatie/Pers/FactsheetEnglish.htm>

Recent figures released by the trust, which is responsible for more than 130 historic sites and attractions across the country (as well as 200,000 acres of countryside, 46 of Scotland's Munros, seven nature reserves, 248 miles of coastline and 16 remote islands), have revealed that the "general income" cash pot of reserves had now reached more than £22m (US\$34m). Several large legacies, high-profile public appeals and a surge in new members have all been credited with boosting the charity's coffers.

However, the organisation, which also sold off its historic headquarters in Edinburgh city centre at the height of its crisis, pointed out that it was still generating less income from its properties than it was making from them. NTS, which mothballed four sites in 2009, has pledged not to shed any other properties unless they are found to have no heritage value.

Latest figures from the trust show that legacies, which accounted for £5.9m (US\$9.1m) two years ago, rose to £8.1m (US\$12.5m) last year and now stand at £12.4m (US\$19.2m). Chief executive Ms Mavor said: "Our financial reserves are in a much better place than they were a few years ago. It means we have a buffer in place against poor trading conditions or the unexpected. The fact remains, however, that looking after our buildings, gardens, collections and countryside costs more than we are currently bringing in. Our five-year strategy is designed to address that fundamental imbalance."

One campaign asked members to make donations of at least £15 (US\$23) to the new "I'm in it for the Future" fund which aimed to raise £110,000 (US\$170,000) in a short time. Ms Mavor said: "In my letter I have painted a nightmare scenario in which a place like Culzean Castle is allowed to fall into disrepair and eventually crumbles to a graffiti-ridden hulk, the memories, history and shared culture it represents lost forever. That has happened all too often in the past to all sorts of heritage properties. Even a small donation can prevent this prospect from becoming a reality."

Funding the National Trust of England, Wales and Northern Ireland

In its 2011/12 Annual Report, the NTEWNI's income was £435 million, of which nearly £130m was from membership fees, £56m from its business arm (National Trust Enterprises), £44m from catering, £44m in legacies, £37m in rents, £32m in grants, £30m from investments and £19m in admission fees (the remainder coming from appeals, gifts, holiday cottages, events and hotel income).

£230m was spent on property operations, £67m on conservation projects, £62m on membership, £45m on Enterprises, £16m on conservation and advisory services, £10m on acquisitions, £7m on hotel costs, £3m on investment management fees, £3m on fundraising and £2m on governance.

3.3 Outreach and education

Minister Moheni said at the workshop that the heritage conservation message had not been taken sufficiently to the public, schools and community groups. He added that protecting and understanding our heritage was important, not just for its own sake but because it makes us a more humane and just society.

a) Awareness raising

Heritage trusts commonly undertake the following duties to promote and enhance the public's interest and awareness of heritage through:

- Organising exhibitions, guided tours, lectures, workshops and conferences

- Establishing heritage trails and providing visitor facilities
- Assisting local councils in publishing heritage-related publications and arranging heritage related activities such as training tourist ambassadors
- Installing plaques and other means to commemorate and highlight sites and locations relating to important historical events and figures, and places where well-known buildings once stood

Jamaican Minister of Youth and Culture, Hon. Lisa Hanna, is encouraging the Jamaica National Heritage Trust (JNHT) to host more lectures as an avenue to keep Jamaicans informed about their history and heritage. “You can bring in various speakers. It is something I have spoken to the Board Chairman about and it is something that I will continue to push for. Even if it is once a month...people deserve to hear about their history and their heritage,” she stressed. Ms. Hanna was speaking at the launch of the JNHT’s publication, ‘*Jamaica: Heritage in Pictures*’, at the agency’s headquarters, downtown Kingston.⁵¹

Connecting people and place, London

London's blue plaques scheme, founded in 1866, is believed to be the oldest of its kind in the world and has inspired many other schemes across London, the UK and even further afield. Run successively by the Royal Society of Arts, the London County Council, the Greater London Council, and since 1986, English Heritage, Blue Plaques commemorate the link between notable figures of the past and the buildings in which they lived and worked. It is a uniquely successful means of connecting people and place.

b) *Schools*

National Trusts also work to promote the knowledge of heritage in schools through:

- Collaborating with the Ministry of Education and educational institutions to promote the study and understanding of heritage
- Producing audiovisual programmes, CD-ROMs and web pages on heritage, publishing information pamphlets, map guides, worksheets, excavation reports and other literature
- Arranging heritage related activities such as lectures, workshops and tours for teachers and students to enhance their awareness of the country’s heritage
- Organising ‘young friends of heritage’ schemes to provide heritage related training to secondary school children

INTACH Heritage and Education Service (HECS)

The idea of setting up Heritage Club in schools across the country began in 2002 to provide training and resources to teachers in urban and rural areas. It was done with the motive of creating awareness and participation in heritage related activities among the students. At present, HECS has a nation wide network which includes 1500 schools in 70 cities and town across the country. It has over 50,000 members participating actively in its work.

Every student who becomes a member of heritage club is motivated to participate in heritage conservation and to learn more about their local and natural heritage. A student who becomes a member of INTACH Heritage Club receives:

- Heritage club badge to become a part of the growing community of heritage keepers.
- Heritage club passport to identify with the Heritage Club movement.
- Nine Stars is given to record information about the natural and cultural heritage of their

⁵¹ <http://www.jis.gov.jm/news/byministry/33606-minister-hanna-urges-heritage-trust-to-stage-regular-lectures->

town and city.

- Young INTACH which is a quarterly newsletter for Heritage Club student members on various aspect of heritage related news and information.

The heritage club programmes are designed so as to involve students in various activities geared towards heritage awareness and education for

- Learning a Craft
- Museum Education & Outreach Programmes
- Training Museum Guides
- Conservation at Home and at School
- Heritage Radio Programme
- Rural Heritage Education and Skill Development
- Children's Programmes at Heritage Festivals
- Making of films on culture and heritage⁵²

Trusts also encourage and stimulate private sector involvement in heritage through organising schemes like the Irish National Trust's 'Green-Schools Programme'.

An Taisce (the Irish National Trust)'s Green-Schools Programme

Green-Schools in Ireland is operated and co-ordinated by the Environmental Education Unit of An Taisce the National Trust for Ireland, in partnership with Local Authorities throughout the country, and supported by the Department of Environment, Community and Local Government, the Department of Transport, Tourism and Sport, sponsored by Repak (not for profit packaging recycling scheme) and the Wrigley Company Ltd (confectionary company).

Over 3,600 primary, secondary and special schools in Ireland (>88% of all Irish schools) are currently participating part in the programme and 2573 schools have been awarded the Green Flag. The Irish Green-Schools programme is one of the most successful within the international network. One of the main factors in the success of the Irish Green-Schools programme is the partnership between the Environmental Education Unit of An Taisce and Local Authorities i.e. the financial and time contribution of the Local Authorities to the programme. Most of the Local Authorities (City & County Councils) have an Environmental Education Officer (EEO). These officers provide the invaluable on the ground support to schools undertaking the programme.⁵³

c) Networking

Heritage trusts enhance co-operation with local and overseas institutions including government agencies, professional bodies, overseas and Mainland cultural institutions, in order to promote heritage education through the organisation of cultural exchange programmes and international conferences.⁵⁴

Networking with other ngos and civil society groups was also felt to be vital to the Trust's success, and the workshop demonstrated that the stakeholders were able to collaborate on issues of mutual interest.

Trinidad and Tobago's own Environmental Management Authority (EMA) was cited as a possible model for the National Trust in how it co-ordinates all environmental matters,

⁵² <http://www.intach.org/divi-hecs-hc.asp?links=dhecs2>

⁵³ <http://www.greenschoolsireland.org/about-us/green-schools-in-ireland.106.html>

⁵⁴ Study on the Feasibility, Framework and Implementation Plan for Setting up a Statutory Heritage Trust in Hong Kong, Final Report published by GHK, April 2013

provides the institutional and legal focus for environmental management and galvanises support from the various government agencies, ngos and community based organisations active in the sector.

Start up funding for the institution was made available through a World Bank loan with additional assistance from the United Nations Development Programme (UNDP) and the Government of Trinidad and Tobago. This funding has given the EMA appropriate operational resources and it also seems to have a much clearer mandate and law enforcement ability than the National Trust.⁵⁵

With the easing of sanctions on Burma comes concern that the unique built heritage of the country, in effect preserved by years of isolation, will be lost if something's not done to protect it. In particular, historians, architects and planners are working together to develop a plan to preserve the unique streetscape of the city of Rangoon, once said to be the wealthiest city in Asia. For the moment, many of the grand buildings of the era of the British are still standing, but they're at risk of being bulldozed by developers.

Yangon Heritage Trust, Myanmar

Burma's population remains extraordinarily diverse and in Rangoon one of the few positive side effects of years of isolation and lack of development has meant that the cityscape has not changed much either. And there is now a real push on to preserve it.

Michael Slingsby of UN Habitat said "It's a wonderful opportunity. We have the chance to preserve what is here before ad hoc development has taken place and to avoid the sort of mistakes that Singapore did and let all the shop houses be demolished, ending up a few streets that are preserved in a rather artificial way. There's a chance here in Rangoon to keep the whole fabric of the inner city preserved."

Many of the city buildings are former administrative offices, effectively abandoned when the Government built a new capital in Napidor and moved. The building styles are diverse, and while many were built during colonial era, a highly fraught period of Burmese history, the country's architects say it's a time that should be remembered. Chaw Kalyar of the Myanmar Architects Association said "It is part of our history. We cannot erase them. We all have to accept that it is part of our history and it is the link between our past and our future. So these buildings are important in our history as well because we've been a colony for a hundred years."

Burma's president agreed to a temporary moratorium on the demolition of buildings while the Yangon Heritage Trust puts together a plan to regulate renovation as well as sales so that private houses are saved as well as government landmarks.

Thant Myint-U, grandson of the UN Secretary-General U-Thant and founder of the Trust said "What would be great is if we could keep the overall cityscape, with people from so many different cultural backgrounds and religions living within a square mile. Rather than just sort of keeping a few big buildings as tourist attractions, if we can preserve as much of this cosmopolitan part of the city as possible, I think that would be a very useful - not just useful thing economically and perhaps in terms of tourist - drawing in tourists in the future, but also an important thing for this country as a multi-ethnic country going forward as well."⁵⁶

⁵⁵ http://www.ema.co.tt/cms/index.php?option=com_content&task=view&id=35&Itemid=42

⁵⁶ <http://www.abc.net.au/lateline/content/2012/s3497521.htm>

d) *Information*

Certainly it seemed clear that the Trust needed an outreach programme to change mindsets and win hearts and minds. There appears to be some confusion over listing, which was perceived as a bad thing for property owners and people seem unaware of the benefits of preserving listed property. There is also a need for providing advice on restoration techniques – or even living with historic buildings (with a proviso that the Trust listen to its own advice as well).

The Jamaican National Heritage Trust (a statutory body under the Ministry of Information, Culture, Youth and Sports with a legal mandate to protect and preserve the nation's heritage, not dissimilar to the Trinidad and Tobago Trust⁵⁷) publishes a series of conservation guides and documents to this end⁵⁸ as does the US NTHP⁵⁹, with sponsorship from Valspar, a paint manufacturer.

e) *Social media campaigns*

The workshop highlighted the need to create public awareness campaigns across the country and to encourage communities to stand up for their heritage. People understood the need to explore organic and strategic ways to facilitate this, through the use of social media, for example.

Good examples of national awareness raising campaigns are the Italian National Trust's "*I Luoghi del Cuore*" ("Places I Love") and the US National Trust's "*11 Most Endangered*".

I Luoghi del Cuore ("Places I Love")

I Luoghi del Cuore is a national survey which, every two years from 2003, Fondo Ambiente Italiano (FAI or Italian National Trust) has promoted with its partner Banca Intesa Sanpaolo. Over a six month period, people are asked, both online and on printed cards at FAI sites, to vote for their favourite place in Italy. People are asked to nominate places they hold particularly dear (places of the heart, favourite places, places I love) and which they wish to be preserved for future generations. These can be big or small, famous or little known, as long as they are special to someone.

FAI then enumerates the entries received and selects certain places to work on. Thanks to the census, some of them will then be restored, in co-operation with the relevant local institution and the contribution of the bank; others will be referred for the attention of the authorities concerned. The aim is to effectively involve the whole population - regardless of age and nationality - by fostering awareness of our artistic, monumental and natural heritage.

The scale of public involvement has been unprecedented. Through a carefully planned media campaign to raise awareness of the Italian cultural heritage and the ease of engagement in the survey, a wide public has become involved. This is demonstrated by the 464,649 votes for 14,000 places in the 2012. The collaboration with Intesa Sanpaolo means that funding for restoration work of selected cultural heritage is achieved and the project has inspired schemes elsewhere in Europe, including by the National Trust in London.⁶⁰

⁵⁷ http://jnht.com/jnht_act_1985.php

⁵⁸ http://jnht.com/document_forms.php

⁵⁹ <http://www.preservationnation.org/resources/homeowners/>

⁶⁰ <http://www.iluoghidelcuore.it/>

This Place Matters and 11 Most Endangered

The National Trust for Historic Preservation runs two similar campaigns: "This Place Matters," where Americans are invited to post stories and photos using social media sites Flickr and Google Maps highlighting personal, regional and national places that matter to them, with individual stories offering insights into family heritage, neighbourhood identity and the diversity of the American experience. The campaign aims to elevate the sites' visibility and underscore the need for their preservation.

Since 1988, the National Trust has used its list of America's 11 Most Endangered Historic Places to raise awareness about the threats facing some of the nation's greatest treasures. The list, which has identified 242 sites to date, has been so successful in galvanizing preservation efforts that only a handful of sites have been lost. Dozens of sites have been saved through the tireless work of the National Trust, its partners, and local preservationists across the country. Many more sites are now considered "favourable" and are on the path to a positive solution. Still, others remain threatened, and the National Trust and its partners continue in their efforts to protect these important endangered places.⁶¹

f) *Open days*

Open days are a good way of building awareness. The idea of '*Journée Portes Ouvertes*' began in France in the 1980s when heritage protection, which previously had focussed on large, prestigious and 'honey pot' sites such as cathedrals, castles, palaces and government buildings, began to open up. More ordinary buildings like shops, cinemas, cemeteries and 20th-century buildings became of interest and at the same time a policy of decentralisation and citizen involvement in the decision making process brought the public into closer contact with their heritage.

The formula of the heritage day is to open, once a year on a special day or weekend, a number of historic buildings free of charge and provide information about their history, guided tours, concerts, craft demonstrations, activities for children, etc. The idea is to open all sort of buildings, not just protected monuments but anywhere that can tell a story. And preferably somewhere normally closed or only offering partial access, for instance being allowed to go past the information desk at the town hall to visit the mayor's office, the cellar or attic.

Heritage Days now take place in the 49 signatory States to the European Cultural Convention. They highlight local skills and traditions, architecture and works of art, but the broader aims are to raise awareness of cultural diversity; to stimulate appreciation; to encourage greater tolerance; to highlight the need to protect cultural heritage against new threats; and to invite Europe to respond to the social, political and economic challenges it faces. 20 million visitors come to these heritage days which have now grown to include other countries around the world including Tunisia, Australia, Brazil and Canada.

Some good tips for a heritage open day include letting children guide visitors around monuments, perhaps as part of an 'Adopt a Site' school project; using it as a platform for a new publication, exhibition or starting/completing a restoration project; producing brochures, leaflets or maps that can be shared with tourist agencies afterwards; keeping sites open on a more regular basis after 'testing' interest through a heritage day; and advocacy – when local politicians are invited to give a speech at the start of a heritage day they are often surprised by the depth of interest of their audience!

⁶¹ <http://www.preservationnation.org/issues/11-most-endangered/about-11-most-endangered-list.html>

Barbados National Trust Open House Programme

A similar idea is being implemented in Barbados to raise funds to support heritage preservation efforts. Visitors and locals can enjoy an insight into the architecture, history, culture and lifestyles of private homes, courtesy of the Barbados National Trust's Open House Programme, a winter tradition for over 30 years.

The season runs from January to April and usually includes about 13 private homes all chosen for their special features. Some are architectural wonders, others carry a great history and some are simply too elegant to miss. At a Barbados National Trust Open House Tour, antique chic meets modern luxury, and from one week to the next you are likely to take in anything from a 17th century plantation house to a Sandy Lane dream villa.

A garden party atmosphere prevails at these events, with fresh juices, homemade rum punch and snacks served on the lawns. Books on Barbados and the Caribbean are available for purchase, select artists and craftspeople have their goods on sale, and often other attractions such as wine tasting and plant sales are included.⁶²

Heritage Open Days National Partnership

England's Heritage Open Days programme is run by the Heritage Open Days National Partnership. Formed in 2011, the Partnership brings together Europe's largest conservation and heritage charity in the form of the National Trust, the most extensive network of local community based heritage organisations through Civic Voice and expertise from the leading coalition of national voluntary heritage organisations in The Heritage Alliance. Together with the Heritage Open Days Advisory Group, they are working to make Heritage Open Days even better and to create a sustainable future for England's most popular grassroots cultural event. English Heritage provides grant aid until March 2015, whilst the Partnership develops both a long-term future strategy and funding.⁶³

Internships, competitions and a membership recruitment drive were also mentioned as ways of increasing engagement.

g) Pilot project – Mille Fleurs

It was felt vitally important to engender a sense of responsibility for the country's heritage amongst communities, and the Trust running a pilot restoration project seemed a good profile-raiser. Demonstrating results on the ground will encourage donations and memberships.

A building in crisis, such as Mille Fleurs, could act as a model for future conservation projects (a sustainable new use, perhaps hosting a small National Trust office alongside public access and corporate rental, in return for financial investment?), but could also provide a rallying call for Trinbagonian preservationists and would help determine how the community regards the both the National Trust and heritage issues in the future.

The conservation priorities are easy to see at Mille Fleurs, starting from such a very low base. The need for wider engagement though is a harder concept to sell and a much bigger challenge. How is Mille Fleurs perceived locally? Is it considered as white colonial heritage and therefore irrelevant? Of course those present at the workshop could clearly see the benefit in developing the site and offering local people the opportunity to visit, use as a venue for weddings and cultural events, and as a source of employment through tourism.

⁶² <http://www.barbados.org/openhse.htm>

⁶³ <http://www.heritageopendays.org.uk/>

Partnership will be key to Mille Fleurs' recovery. Heritage trusts need to be adept at forging coalitions, recruiting allies and building grass-roots support. Those who take on such disputes stay in for the long haul and perseverance often, but not always, pays off.

The US National Trust has done considerable work with local preservation groups having to respond to a heritage emergency. By providing information and support, the Trust is able to build capacity within communities to help themselves. A summary of the steps necessary to ensure good community action is given below and more information can be provided.

A process for Community Action (US National Trust)

- Know the building (significance, ownership, zoning/planning controls, physical condition, market value, accessibility)
- Identify the threat (demolition, neglect, incompatible use)
- Determine 'reality' (evaluate climate of opinion, assess time limits, know process for project approval, identify allies)
- Know your goal (relative to specific case, relative to community, relative to organisation)
- Explore alternatives with owner/developer (prepare to negotiate)
- Question further action (is this the right battle at the right time?)
- Prepare for conflict (secure organisational support, estimate time and money commitment of organisation and volunteers, appoint a co-ordinator, select committees, establish network of allies)
- Plan to win (develop the case for your cause, present well-researched testimony, generate positive media coverage, involve the public, involve politicians, consider litigation, keep public and organisation involved of progress)
- So what if you don't win (often it takes the loss of an important building to make a community recognise how vulnerable its resources are and to take steps to protect them – you have won if the loss of one building leads to the protection of others)⁶⁴

Strawberry Hill Trust, UK

The Strawberry Hill Trust was formed in August 2002 with a mission to restore Horace Walpole's 'plaything house' on the River Thames, which from 1747 he transformed into a gothic castle, and open it to a wider public. Famous in the history of architecture, and culture generally, on an international level, the building had become seriously neglected, falling into decay and suffering even more from poor repairs. By public engagement and local and national support, in 2007 it was possible for the foundation to obtain a long lease and start restoration work, based on highly detailed research and the archaeology of the building itself.⁶⁵

The Trust, a registered charity established in 2002 has taken over a 120 year lease from the Catholic Education Service, the owner of the property, and secured £8.9 million (US\$13.8m) in funding to restore the building and garden.

In the citation for its recent Europa Nostra award, the Jury "applauded the beautiful conservation of this exceptionally influential place, and admired the courage and commitment shown by local volunteers and their professional partners".⁶⁶

Through signing petitions, participating in tours, public meetings and vigils, raising funds, acting as spokespeople and advocates, planning the future use, even working on less-

⁶⁴ Rescuing Historic Resources: How to respond to a Preservation Emergency by Leah Konicki, in *Information Series*, National Trust for Historic Preservation 1991

⁶⁵ <http://www.strawberryhillhouse.org.uk/index.php>

⁶⁶ <http://www.europanostra.org/awards/109/>

sensitive parts of the restoration, such as the garden, local community support and engagement is essential.

A demonstration project could also involve an element of practical conservation or a restoration workcamp involving young people, linked to a co-ordinated Communications Strategy.

h) **With the people' not for the people' or 'Don't just join – join in!'**

Ten years ago, the National Trust of England, Wales and Northern Ireland began to think slightly differently about the visitor experience it was providing.

The National Trust's 'open arms approach'

Tyntesfield is a spectacular Victorian gothic mansion, which was put up for sale in April 2002 following the death of Lord Wraxall, a descendant of the original owner. His will divided the estate between 19 beneficiaries, making it impossible for any family member to take it on. The Trust decided to try to buy it, which meant competing at auction with other bidders – it was even rumoured that Kylie Minogue was interested!

In just 8 weeks, the Trust raised £24m (US\$37m) including £8m (US\$12m) in a public campaign – and four years later the Trust received an additional £20m (US\$30m) from the Heritage Lottery Fund to restore the building and estate and fully open it up for public access.

From the first, the Trust believed that Tyntesfield must be about and for people as well as protecting its intrinsic value. The money to acquire it was raised through popular support and from government grants, so it had been bought 'by and for the nation'.

Instead of following previous practice and closing it for several years while it was prepared to the public, the Trust opened Tyntesfield immediately, without any facilities, so that visitors could see what their money had bought, and see conservation work from the very first moment.

Conservation teams worked in full view of the public, inviting their questions and stopping to explain what they were doing. Sometimes, as when the wiring and roof were replaced in 2008, this was difficult, but by arranging guided tours of the roof and explaining – with all the floorboards up – how a Victorian house worked, people said their visit was actually enhanced. The dilapidated sawmill has been turned into a learning centre, the milking parlour into a visitor centre, carpets and floors replaced, and the chapel made watertight – all with public participation. Last year, the restoration of the Orangery won an award for involving stonemasons from the local college.

From how the funds were raised to the way the Trust broke new ground in accessible conservation, Tyntesfield spearheaded its new approach. Now, across the organisation, there is a more friendly, lively welcome, and fewer ropes and 'do not touch' signs.

This 'open-arms' approach is replicated across the INTO network. In St Lucia, the 2010-2020 Strategy explains 'In a nutshell, we will use our essential and often fascinating conservation and environmental work to inspire and engage people more deeply in our activities, encouraging people not only to 'join' but to 'join in' our vital cause. We want the Trust to be less of an amenity and more of a movement.'⁶⁷

⁶⁷ Chase, Vasantha (2009) *Protecting Fair Helen's Patrimony: Our future plans April 2010 to March 2020* St Lucia National Trust

i) *Public-Private Partnerships*

In the case of Tynesfield, the Trust was lucky enough to be able to buy the property outright. However, for many Trusts this is simply not an option and Public-Private-Partnerships have been developed between owners, often government bodies, and civil society groups to protect, conserve and provide new uses for old buildings.

Not even the richest of countries has sufficient financial resources in the public sector to own, rehabilitate and maintain all of the heritage buildings worthy of preservation. In most countries the NGO sector does not own the properties and does not have significant financial capital or development expertise.⁶⁸ To enhance and promote the cause of heritage conservation, INTACH has therefore signed Memoranda of Understanding (MOU's) with several national and international organisations. It has received support from Central Government and several ministries such as Education and Human Resource Development, Environment and Forests, and Tourism and Culture and initiated a range of projects with state governments. INTACH has also received funds from foundations and international agencies such as UNESCO, World Monuments Fund, the Helen Hamlyn Trust and Jaisalmer in Jeopardy for conservation work and other related activities.

A Public-Private Partnership for urban heritage in Mumbai

In 1996, approached the Municipal Corporation Greater Mumbai (MCGM) with a proposal to restore the Dr Bhau Daji Lad Museum. Its grand Palladian building and priceless treasures, numbering over 6,000 that showcase the city's artistic, economic and social history, had fallen victim to decades of neglect and government apathy, as well as damage from rodents and termites.⁶⁹ Years of negotiations and attempts to find a sponsor who would have the courage to take on such a challenging project finally yielded results and in 2003, the Jamnalal Bajaj Foundation gave an initial grant of Rs 1.5 crores to the project (circa US \$300,000). On 3 February 2003, the MCGM took an historic decision and a tripartite agreement was concluded and signed between the Corporation, which owns the museum, INTACH and the Bajaj Foundation detailing roles and functions for the restoration project.⁷⁰ Accordingly, a new 19-member management trust was created with 10 members from the Corporation, six lifetime members appointed by INTACH and three lifetime members from the Bajaj Foundation.

Governments are sometimes reluctant to share responsibility with private parties, particularly in the field of heritage conservation and overcoming this negativity is a challenge. In this case, INTACH's 25 years of experience give it credibility in the eyes of its public partners, who are learning to understand the benefits of partnership and to feel less threatened.

In the words spoken by Kerala's tourism minister, Professor KV Thomas at the Fort Cochin Initiative launch in 2001, "heritage buildings and precincts are now highly vulnerable targets of economic pressure, qualifying themselves as 'endangered'". Their existence, particularly in urban areas is under severe threat. The role of NGOs like INTACH's in this great challenge for heritage conservation is as facilitator, catalyst and the educator but they do not act alone and need Government support to build and strengthen public-private partnership in the heritage sector.⁷¹

⁶⁸ Rypkema, Donovan, 'The Role of Public-Private Partnerships' in *Heritage and Development: Papers and Recommendations of the 12th International Conference of National Trusts, New Delhi, 3-5 December 2007* p173

⁶⁹ *Outlook* 21 Jan 2008 p63

⁷⁰ Meehta, Tasneem, *Funding for Conservation Projects: Public-Private Partnership and managing the Stakeholders* in *Heritage and Development: Papers and Recommendations of the 12th International Conference of National Trusts, New Delhi, 3-5 December 2007* p204

⁷¹ Seth, Rabindra, *Tourism in India an overview*, Delhi 2005 p248

By entering into a Public-Private Partnership with a coalition including the National Trust and Citizens for Conservation, the Trinidad and Tobago government could mandate civil society to fundraise for Mille Fleurs.

North Kowloon Magistracy building - A Heritage PPP in Hong Kong

When the Commissioner for Heritage's Office (CHO) was established in 2008, Mrs Carrie Lam, Secretary for Development, said "In recent times, Hong Kong's people have expressed a passion for the city's historic past and its place in our future. Indeed, it is to be expected that a mature and advanced society such as ours should become more aware of its historic legacy, and seek to devote extra resources for its conservation. Many of our buildings have matured alongside us and, like us, may need special attention in later life. This inheritance is something that we should cherish, and in the years ahead we will undertake to devote extra time and effort to heritage conservation and to the revitalisation of our historic buildings."

As one of various measures to enhance heritage conservation, the CHO promotes the adaptive re-use of suitable government-owned historic buildings under the Revitalising Historic Buildings Through Partnership Scheme (Revitalisation Scheme). The main objectives of the Scheme are to preserve and put heritage buildings to good and innovative use; to transform them into unique cultural landmarks; to promote active public participation in the conservation of historic buildings and to create job opportunities.

The CHO invited proposals from non-profit-making organisations (NPOs) to reuse the North Kowloon Magistracy site as a social enterprise. In their applications, NPOs were required to provide detailed plans on how the historic buildings would be preserved and their historical significance brought out effectively, how the social enterprise would be operated in order to achieve financial viability and how the local community would benefit. These were assessed by the Advisory Committee on Revitalisation of Historic Buildings (ACRHB), comprising government and non-government experts.

The Savannah College of Art and Design was successful and SCAD Hong Kong signed a tenancy agreement with the government. Renovation work, which began on 1 December 2009, was completed on 7 July 2010 with classes beginning on 13 September 2010.

Chief Executive of the Development Bureau of the Hong Kong Special Administration, Donald Tsang, said "We were rather, as a government, hesitant [...] in the beginning because building and land assets are perhaps the most valuable things we have in Hong Kong. Turning these assets into something which are not profit-making always scares us a bit but now, I believe we have done something right". He added that SCAD's community programmes have transformed the area "We are rediscovering our own soul, our own spirit in it." The project created 220 jobs during renovation with 147 (full-time) and 67 (part-time) going forward and demonstrates the importance of:

- Performance specifications and competition – the government had a plainly stated set of expectations and undertook a formal and transparent selection process, linked to clear policy objectives.
- Maintaining value of public assets – often assets in public hands are actually declining in value through lack of fiscal resources, expertise or management efficiency. The Public Private Partnership (PPP) was structured to enhance this public asset.
- Tapping into innovation from the private sector via the PPP
- Service/tenancy agreements - Government retained the title of the heritage building.
- Building confidence through successful PPPs could lead to the creation of a national trust style citizen movement.

In conclusion, it is recommended that public partners have very clear systems and objectives and that private partners should not be put off by, what might seem to be, complex and lengthy processes.⁷²

j) A success story

The Sugar Heritage Village at Brechin Castle blazes a trail for such an arrangement, bringing together as it does diverse groups to honour and preserve the memory of the nation's sugar industry and regenerate the surrounding Couva/Point Lisas area. New educational, environmental, recreational and commercial facilities will be developed on the 562 acre site, abandoned after the closure of the country's sugar cane industry in 2003, and much progress has already been made. Those involved include Trinidad and Tobago's Government, local organisations, and a cabinet-appointed steering committee comprised of government officials, project managers and people who used to be involved in the sugar industry.⁷³ Professor Brinsley Samaroo, Chairman of the Sugar Heritage Village, said that funding was being sought from the EU, the Green Fund and private investors in addition to government support. This impressive initiative could certainly be a model for other large-scale heritage projects in Trinidad and Tobago.

⁷² Leonard, Catherine (2012) *University breathes new life into North Kowloon Magistracy, Hong Kong* in Managing Heritage Cities in Asia and Europe: The Role of Public-Private Partnerships, Asia-Europe Foundation

⁷³ <http://www.sugarheritagevillage.com/index.php>

4. Conclusions

The initial founding of the Trust showed the willingness of Government to explore different approaches to using heritage assets and alternative models of conservation management.

The National Trust's on-going programme of community outreach, education, and public information has built awareness of Trinidad and Tobago's cultural heritage. And as a membership organisation, the Trust has also demonstrated its civil society credentials. A well-run Trust could build on these positives.

To create the necessary conditions that would encourage citizens to place greater value on their heritage, it would be helpful if more conservation projects could be carried out under the aegis of the National Trust. Not only would such initiatives build the credibility and visibility of the Trust, they would provide models of innovative adaptive reuse and good planning. Success breeds success and a good conservation project, however modest in size, could encourage public debate about – and support for – heritage issues in Trinidad and Tobago.

With a communications programme in place promoting the pilot project, reinforcing and sharing the social and environmental benefits of bringing heritage properties into new and creative uses, the Trust will increase its membership and supporter base.

The use of public money to preserve privately-owned historic buildings (and conversely the use of donated funds to preserve government-owned properties) requires consensus among stakeholders. Therefore, unless the Government entrusts the ownership of these historic buildings for revitalisation to the Trust, it may be expected that funding would continue to be provided by Government, being the owner, with the Trust acting as manager.

The Trust could provide information, guidance and consultancy services to private owners of historic buildings and potentially offer small grants towards upkeep, alongside moral support.

It could certainly continue to inform future policy direction. Areas to explore in the future might include whether public money could be used to pay compensation to private owners conserving historic buildings, mechanisms for providing economic incentives such as tax credits for historic preservation, or whether planning tools should be used to advance heritage conservation.

Whatever we feel about the Trust's role in listing, it has become imperative for the Trust to be seen to begin the Register. Listing was identified as a priority for the Trust and Minister de Coteau has taken steps to move this forward with the first sites ready to be gazetted. This progress will not only show the Trust to be active, but it will provide an opportunity to communicate further information about listing and begin to dispel owners' reluctance to have their properties listed due to perceived negative impact on property value and development potentials. The complicated listing process could be simplified, as in New Zealand or the UK.

Experience from National Trusts across the globe shows that most began with a small group of committed members that later grew to a sizeable membership through various means. Therefore, membership building requires substantial time and continuous effort by the Trust through innovative and attractive programmes to attract and retain memberships. Financially, it implies that the Trust would still require substantial Government support during its infancy. The fact that Government funding is limited will inevitably limit the number of tasks the Trust can take on.

Over time, and hopefully with good results achieved by the Trust, heritage protection and appreciation in Trinidad and Tobago will be strengthened and will meet (and surpass!) regional standards.

Chief Executive Officer

Overall Objective

Reporting to the National Trust Council, the Chief Executive Officer (CEO) is fully accountable for all aspects of the successful running of the Trinidad and Tobago National Trust. He or she must ensure that both its day-to-day operations and its strategic development reflect the very highest standards of businesses and charitable foundations in Trinidad and Tobago and of heritage conservation best practice. The governance of the Trust must also be able to stand up to a high level of public scrutiny.

Principal Accountabilities

- i) Financial – Although not for profit, the National Trust has an obligation to be entrepreneurial in outlook and to generate a surplus in due course both to avoid continuing Government subvention but also to provide capital for future growth. Acting through the Finance Director, the CEO must set the tone for the Trust, determine its commercial strategies and see that they are implemented effectively.
- ii) Governance – Notwithstanding the commercial role, the CEO must ensure that, as an arms-length body, the Trust is open to scrutiny by the Ministry of National Diversity and Social Integration and the public and works to the highest standards of corporate governance. Although he/she will have access to an internal audit function, their personal behaviour and approach will be as important as the technical aspects.
- iii) Communications – Although the CEO will have Directors accountable for specific functions, the ultimate accountability for the Trinidad and Tobago National Trust becoming a viable operation rests with the CEO. He or she will present exceptionally well to a variety of audiences, develop a wide circle of influential contacts who can help the Trust including the media, and interact regularly with Government officials.
- iv) Operations – The CEO must ensure that the National Trust's assets are operated and administered efficiently, cost effectively and be commercially viable. He or she must guide the overall strategy to accomplish this and ensure that his/her subordinates deliver effectively.
- v) Membership – In order to help sustain the Trust's viability, members, whether individual or corporate, are essential. The CEO, in collaboration with senior staff and the National Trust Council, must set the policy and guide the processes for attracting members, for rewarding them and incentivising them to remain contributors to the Trust. Similarly, he / she will set the policy for volunteers and provide guidance for their deployment.
- vi) Staff – Although staff numbers will not be large, they will come from a variety of backgrounds and influences. The CEO must quickly form them into a cohesive and highly motivated team and avoid a "silo" mentality in order to utilise these scarce and expensive resources to the full.
- vii) Conservation and education – The CEO must be personally committed to the principles of the National Trust and inspire the team to be equally dedicated. In order for the Trust to achieve its objectives – and to be seen to do so – conservation and education about heritage matters is a critical part of the CEO's role. The CEO must

further ensure that, to achieve this accountability every member of the team has conservation goals against which their performance is measured;

- viii) International Good Practice – The CEO will keep up to date with the latest international trends and research in heritage and conservation matters so that the Trinidad and Tobago National Trust has access to the most modern ways to manage and conserve heritage buildings while operating effectively commercially. He / she will develop relationships with other exemplary international heritage organisations and encourage his / her staff to do so as well as a means to share experience and to increase recognition of the Trinidad and Tobago National Trust and heritage conservation more widely throughout the nation

Qualifications Required

- University degree or higher
- At least 15 years of experience in leading teams in the culture and heritage, civil society, environment, education, entertainment or hospitality sectors.
- A strong interest and preferably qualifications in heritage matters
- In depth knowledge of Trinidad and Tobago and its business environment
- Knowledge and experience of working with the Trinidad and Tobago Government
- Charismatic leader and strategic thinker
- Excellent communication skills
- Business like and experienced⁷⁴

⁷⁴ Study on the Feasibility, Framework and Implementation Plan for Setting up a Statutory Heritage Trust in Hong Kong, Final Report published by GHK, April 2013

Appendix 2

The Chorley Formula

Annual property expenditure		X
Plus 20% (contingencies 12 ½%, improvements 7 ½%)		X
Plus 20% of annual expenditure plus contingencies (management fee)		<u>X</u>
Total grossed up property expenditure		X
Deduct annual property income		
Rents (less one third)	X	
Other income	<u>X</u>	<u>X</u>
Annual deficit		X
Plus 50% uplift		<u>X</u>
Total grossed up deficit		Y
Capitalisation rate		Z

$$\text{Endowment required} = Y \times \frac{100}{Z}$$

In principle we believe that endowments have to be large enough to generate an annual income which will cover the deficits on a property into the foreseeable future, taking into account the National Trust's standards of management. It is possible that expenditure under Trust management will be greater than under private ownership and we have to make real efforts to picture the mode of future management and estimate the resultant costs.

The major elements in our expenditure are wages and cyclical repair costs. We need to take particular care to make sure that sufficient initial capital expenditure is allowed for at acquisition so that repair provisions can be based on a property in good order.

One third is normally deducted from rents because experience in the UK has shown that income from this source does not keep pace with wage costs though this varies between farmland and housing.

Despite the care which is taken to allow for expenditure under future conditions, the true annual cost can only become clear from actual experience and is often found to contain elements which were not thought of in advance. It is to cover these as well as under-estimates of expected costs that we add 12 ½% for contingencies.

In addition we add a further 7 ½% for improvements. We have found that in order to maintain or increase visitor numbers the Trust has continually to strive to improve standards of presentation, provide new attractions, and upgrade visitor facilities. In addition tenanted houses and cottages have to be modernised and the standards expected advance with each generation.

20% is then added to cover administrative and management overheads. As the number of our properties increase so does our management cost and it is not unreasonable that each property should contribute towards this.

To the annual deficit is added a 50% uplift, on the grounds that investment income tends to increase more slowly than wages (a 2% shortfall is assumed). In the early years this uplift should ensure that income from the endowment would be in excess of the annual property deficit. Gradually as wages overtake dividends, the surplus will diminish but provided that it

has been accumulated and put into reserve the property will have a financial cushion to support it for many years.

The deficit is finally capitalised at a rate that is based on the net yield on the Financial Times All-Share Index. This obviously fluctuates quite markedly and we have experimented with averaging it over a number of quarterly periods. There is no escaping from the fact however that the initial yield on an endowment will be that available from the market on the day that it is invested. We now always use the quoted yield as close as possible to the day when we have funds to invest although this may mean recalculating the formula again.

Our experience has shown that the formula cannot be cast in stone and must be flexible in minor details (perhaps it is not always necessary to deduct 1/3rd from rents and management costs on opens space properties may not be as great as for houses or buildings).⁷⁵

⁷⁵ National Trust Chorley Formula