



Introduction

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THIS IS A SUMMARY OF THE THIRD ANNUAL CORPORATE Plan of the National Trust for Scotland's five-year strategy, Securing the Future of Our Past. The Strategy was set out at our 2011 Annual General Meeting and will take until 2016 to come to fruition.

In the first Corporate Plan, 'Sowing the Seeds', we devoted ourselves to putting in place the conditions necessary to begin delivery of the Strategy. We launched the 'Signature Projects' to act as proving grounds for enhancing every aspect of our work, we undertook fundamental reviews of our properties and collections and we initiated investment in record-keeping and support and development for our staff and volunteers.

Through the second Corporate Plan, 'Taking Root', we took the Signature Projects further and we addressed the need to consolidate and improve our detailed planning processes for properties – 75% of all of our properties now have fully up-to-date plans which set out clear conservation and management objectives. We also made significant progress with our 'Portfolio Review' which gives us a clearer understanding of our properties' significance and potential, helping us identify our investment priorities – this is ground-breaking work which, we hope, will resonate with and inspire other players in fields of conservation and heritage. We have also completed a cost of care exercise for our estate, which tells us that we need to raise £46 million over the next ten years to ensure that the properties we care for are maintained and accessible for current and future generations to enjoy.

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

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



2014's summer is a special one for Scotland, with the 700th Anniversary of the Battle of Bannockburn, the staging of the Ryder Cup and the Commonwealth Games expected to attract many thousands of domestic and overseas visitors to our country. We are well-placed to enhance each visitor's journey by bringing them unique experiences in telling the stories of Scotland.

The coming year is also the time when we can begin to look up and outward. As a conservation charity we have an obligation to speak up for all of Scotland's heritage, not just the particular properties we shelter from the effects of climate and thoughtless development. We will be using our voice and influence where we can to make a difference to the protection and recognition of Scotland's special places. Our arguments will make as much economic as moral sense – the national income generated by historic properties and heritage has, for some years now, surpassed that from other industries, including much of agriculture and fisheries.

While we continue to advance priority projects in such properties as Canna, Newhailes and Culzean, we need to begin looking over the horizon as to how we will best deliver our charitable purposes beyond 2016/17. At this mid-point of our five-year strategy, it is time to start thinking about the next five years and beyond even that. We will devote part of the coming year to a dialogue with our members and communities of interest about a long-term vision for the Trust. This is a vision we want more people to share with us, and we will continue to make efforts to attract more people to our properties and to join us as members in order to take a collective stake in our national heritage.

Our financial position remains difficult, exacerbated by the sluggish recovery from the trough the economy fell into after 2007. We still aim to achieve financial breakeven in our operations through our five-year strategy – indeed, we MUST do this if everything we hope and plan for is to come to fruition. We are under no illusions how difficult this is going to be, but in 2014/15 we will make real progress towards our goal. As we look around at the pressures that threaten historic buildings and outstanding natural landscapes, failure to secure the Trust's future would put our national treasures at unacceptable risk.

Format of the Summary Plan

The following pages represent only a brief summary of the key actions that will be delivered by the Trust's staff and volunteers up until the end of February 2015. Each action is itself subject to detailed delivery plans which permeate departmental, property and individual personal objectives.

Detailed presentations on our progress in delivering this plan and our overall achievements with the five-year strategy will be delivered at the 2014 Annual General Meeting and at Local Assemblies. We will also produce regular quarterly updates in summary format based on the performance indicators listed on the following pages and these will continue to be posted on our website.

Scope of the Plan

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



Delivering the Five-Year Strategy

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

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

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

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





ACTIONS	PURPOSES AND TASKS	OUTPUTS

Stra	Strategic Objective 1 – The Portfolio and its Conservation			
Cont	ext: Our portfolio reflects our core purpose (to conserve and prom	ote our heritage) and vision for the future and can be maintained to a high co	onservation standard.	
1.1	Detailed planning processes will continue resulting in the final 25% of our properties having up-to-date five-year Property Plans	 The Property Plan enables property teams to address ongoing maintenance, conservation, visitor services, staffing and volunteering responsibilities 75% of properties now have up-to-date plans. We will ensure that the remaining 25% have updated plans, moving at the same time to a new cycle of production of annual Operating Plans for properties 	 100% of properties to have finalised Property Plans in place by Feb 2015 First Annual Operating Plans ready to begin delivery from Mar 2015 	
1.2	Continued Introduction of Conservation Benchmarks and Guidelines	 The Trust aims to be at the forefront of good conservation practice. We need to be clear what we mean by this and be able to measure our conservation work against agreed standards of good practice Progress was made in the foregoing year and we anticipate that each conservation discipline will benchmark with other organisations to establish what can be measured as part of an embedded system of quality control and continuous improvement Benchmarking will be integrally applied to Conservation Strategy and operational plans 	 Each Conservation discipline will be applying suitable benchmarking operationally by Feb 2015 	
1.3	Delivery of 'Priority Projects' within the Trust's estate	 We will continue to prioritise particular projects in order to focus scarce resources on areas of greatest strategic impact, need and opportunity At Inverewe, we will start garden conservation works and Inverewe House development. At Brodick, we will progress to design of a renewable energy project and finalise specifications for conservation and visitor experience improvements works in 2015. Despite the identification of priorities at six properties in particular, we shall nevertheless ensure general project works and care and maintenance continues as normal across the entire estate 	 Delivery of a masterplan for Brodick Delivery of a masterplan for Inverewe Progress proposals for the future of the David Livingstone Centre by Jan 2015 To improve visitor numbers to Newhailes in 2015 Delivery of a masterplan for Culzean Implementing the findings of a management review of Canna leading to a community partnership working plan and a refreshed conservation plan throughout 2014/15 	



	ACTIONS	PURPOSES AND TASKS	OUTPUTS
Stra	tegic Objective 1 – The Portfolio and its Conservation (contin	nued)	
		mote our heritage) and vision for the future and can be maintained to a high c	onservation standard.
1.4	Open the new visitor centre at Bannockburn	 The project build and installation of the state of the art new visitor centre, along with landscaping and restorative works around the battlefield, have been successfully delivery The new centre opens to the public in March 2014 and there will be official events and ceremonies in June to mark the 700th anniversary of the battle which will stimulate interest in the centre and will enable the Trust to fulfill one of the key objectives of imparting the historical reality and significance the battle The new centre will offer groundbreaking use of technology in engaging visitors and young people in particular in the this very important chapter in the story of Scotland 	 The new Battle of Bannockburn Centre opens to members and the public on 1 Mar 2014 Meet visitor number targets in the business plan.
1.5	Review processes to scale up delivery of conservation projects	 Generous donations and support provide us with the funds to carry out important conservation projects in our properties We must match designated conservation fund to operational delivery and ensure we are able to have the optimum levels of activity carried out 	- New process agreed by Sep 2014
1.6	Development of a longer-term vision for the Trust's future	 We have assessed the cost of care of our whole portfolio and developed a sense of the relative heritage significance amongst the properties We are now in a position to ask ourselves how the Trust should best deliver its charitable purpose (to conserve and promote our heritage) alongside other organisations in 21- century Scotland We will conduct a debate with our members, the public and heritage sector and develop a ten-year vision for the Trust as the starting point for our next phase of strategic planning 	 A high level conference to be staged in May 2014 around the concept of a 'national heritage collection' A poll of members taken over the summer of 2014 'A place for Heritage?' schools competition to be staged from the autumn of 2014 Feedback and thinking about the Trust's future to be debated at the 2014 AGM in Oct A new vision statement for the Trust and strategic directions ready to be incorporated into future planning processes by Feb 2015
1.7	Delivery of the Trust's Climate Action Plan	 The plan was developed in 2013/14 to reduce the Trust's contribution to climate change through reduced energy consumption, use of renewable energy and staff training The plan also touches on our land management policies and involvement in the Green Tourism Business Scheme Specific targets relate to conservation practice in the face of climate change, reduction in energy use and substitution of fossil-fueled energy sources. 	- Specific plan targets for 2014/15 met



ACTIONS	PURPOSES AND TASKS	OUTPUTS
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Stra	Strategic Objective 2 – The Promotion of Scotland's Heritage				
Cont	Context: We tell the stories of all our properties and collections in compelling and inspiring ways. We encourage the effective protection of our natural, built and cultural heritage.				
2.1	Delivery of a new three-year Learning and Interpretation Strategy	Our new Learning Strategy will enable us to increase education visits by 10%, increase online engagement by 10% (e.g. downloadable teacher packs) and increase participation in outdoor learning programmes by 5%	 Learning Strategy targets met by February 2015 		
2.2	Introduction and delivery of a conference and heritage seminar programme	 As part of our efforts to be advocates for heritage and to promote understanding and enjoyment of this, we will organise gatherings designed to help us achieve this A conference in May 2014 will attract key contacts in the sector from Scotland and elsewhere to look at the 'bigger picture' for heritage in Scotland We will also organise seminars which will focus on specific conservation topics in detail 	 High level conference staged in May 2014 Six conservation seminars staged in the course of 2014/15 		
2.3	All Trust Property Managers to incorporate communications objectives within their Property Plans	 Property-based staff and volunteers will be supported and encouraged to identify local communications activity and stakeholder engagement opportunities that will help them meet their overall objectives This will lead to more localised control and flexibility In the foregoing year, 75% of properties were able to prepare and sign up to local communications objectives to help them deliver the main property plans – the remaining 25% will do the same in 2014/15 	 100% of properties to have incorporated communications plans (to include community engagement) into Property Plans by Mar 2015 		
2.4	Improving our academic and research linkages	We will forge partnerships with research bodies so that academic research can be initiated an facilitated through our properties We will encourage and contribute research that will help build up our own and wider expertise in conservation and heritage tourism management	 Recruit a research worker to develop external links Publish a list of all current and potential research projects on the Trust estate. Produce a manifesto for working with HEIs to foster research into conservation-related topics. 		
2.5	Active advocacy work	We will be advocates for the value of volunteering as a key element in public wellbeing and happiness We will also continue to work closely with the Historic Environment Policy Unit of the Scottish Government as the new Historic Environment Strategy is rolled out and in protecting the trust's interests as the new Historic Scotland (formed from the merger of Historic Scotland and RCAHMS) comes into being We will advocate for consideration of the benefits offered by NGO landowners within the current land reform debate	 Report on the value of volunteering by Jun 2014 Participation in the national Historic Environment Strategy working groups Formal contribution to the Land Reform consultation in 2014 		



ACTIONS		PURPOSES AND TASKS	OUTPUTS
Strategic Objective 2 – The Promotion of Scotland's Heritage (continued) Context: We tell the stories of all our properties and collections in compelling and inspiring ways. We encourage the effective protection of our natural, built and cultural heritage.			
2.6	Conduct a review of the refreshed Regional Group structure, the local assemblies and the format of the AGM	Regional Groups have been in place for over a year Now is the time to take stock of how they are supporting the work of the Trust and the extent to which they are helping us stay in touch with local communities	 Review outcomes and recommendations reported by the Trust's AGM in Oct 2014
2.7	Continue to refresh the image of the Trust to attract new supporters	Lively seasonal marketing campaigns aimed at new audiences Refresh use of imagery in our communications to reflect better how visitors can enjoy our properties and the extent of our educational activities	Track perceptions of the Trust through research against current baseline Track campaign results against



ACTIONS PURPOSES AND TASKS OUTPUTS

Strate	egic Objective 3 – Financial Sustainability		
Conte	xt: We run the Trust efficiently and within its means, setting and mea	asuring performance against clear targets.	
3.1	Continuing progress towards achieving financial break-even	We will continue to work towards achieving a break-even position in our operating budget by the end of the five-year strategy period aiming to cover recurring costs with recurring income	Deliver plan on budget (operating deficit of £900k)
3.2	Initiate and support renewable energy projects	 We believe there is considerable potential for the generation of renewable energy through appropriate means within our estate, which in the long run could reduce our operating deficit while contributing to environmental targets This could range from relatively small to much larger schemes with capital costs in the order of circa £10 million We will also explore potential partnerships that will enable us to take on the more challenging, larger scale initiatives 	– £5 million renewables investment fund in place by Mar 2015
3.3	Recruit an additional net 4,000 new members during the course of the year	Increased membership helps sustain the Trust and is critical to our responsibility to share and promote the treasures of Scotland's heritage	 Net increase in Trust membership by 4,000 to a total of 324,000 by Feb 2015
3.4	Increase revenues from commercial partnerships	We will seek further commercial partnerships to provide revenue streams and/or reduce operating costs	 Additional income of £50,000 generated by Feb 2015
3.5	Meet fundraising targets and increase the contribution donations and bequests make to the running of the Trust	 In the course of the foregoing year we started to implement a new strategy to significantly increase our annual fundraising income The money we raise will be used to secure Scotland's heritage on a sustainable basis In 2014/15 we will grow the contributions made through our fundraising activities to £3.8 million excluding legacies We will also work to secure existing grant income and capitalize on opportunities arising from a successor to SRDP 	 £3.8 million of funds (excluding legacies) raised by Feb 2015
3.6	Improve IT resilience and efficiency	 As a necessary component of our disaster recovery plan and the minimisation or risk and financial loss, we will install a new mirror server offsite to ensure our operational continuity We will also continue to roll-out a four-year replacement programme for all desktops and laptops in order to improve operating efficiency 	 New mirror server installation complete by Jun 2014 250 laptops and desktop machines upgraded or replaced by Feb 2015



ACTIONS	PURPOSES AND TASKS	OUTPUTS
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Strate	gic Objective 3 – Financial Sustainability (continued)		
Contex	tt: We run the Trust efficiently and within its means, setting and mea	asuring performance against clear targets.	
3.7	Continue to progress the roll-out of EPOS to our properties	 EPOS (Electronic Point of Sale) provides 'real time' capture of membership and visitor information, including the preferences and choices of our retail and catering customers This information allows us to be more responsive to customer needs Having begun roll-out in the foregoing year, we will continue the process and ensure all of our larger properties are fully equipped 	 - 38 properties to be EPOS equipped by Apr 2015
3.8	Support a further five projects under the Buccleuch Innovation Award Scheme	 These small-scale innovative projects are proposed by staff and volunteers Those selected will improve operational efficiency, help change the working culture of the Trust and allow us to better achieve our core purpose and will be recognised through prizes granted via the "Chairman's Fund" We have supported five projects in 2012/13, another five in 2013/14 and we will recognize and support five more in 2014/15 	– Five BIAS projects selected and underway by Feb 2015



	ACTIONS	PURPOSES AND TASKS	OUTPUTS		
`	Strategic Objective 4 – Visitor Experience Context: We deliver a consistently high quality visitor and membership experience which appeals to a broad range of people.				
4.1	Invest in the improvement of visitor experience at our properties	 We will build on our successful Visitor Experience Champions programme through further investment in training and as part of the property planning process All priority projects will address visitor enjoyment in particular in their proposals Support properties in attracting more people to events by providing web-based marketing materials 	 Improved scores for visitor enjoyment in our annual independent survey Improved scores for Mystery Visit and VisitScotland quality assurance gradings 		

Stra	Strategic Objective 5 – Investment in Our People				
Cont	Context: Our people are motivated, fairly rewarded and have the right skills.				
5.1	Broaden representation on staff and volunteer matters	We recognise that we need to widen staff and volunteer feedback in order to conduct effective staff and volunteer relations To this end, we will include representatives of both volunteers and seasonal staff in regular meetings with management and trade unions	 Seasonal and volunteer representatives recruited and participating by Sep 2014 		
5.2	Develop formal processes to ensure talent management and succession planning	We need to retain and motivate our most talented staff and volunteers in order to sustain the pace of change and innovation within the Trust At the same time we must have others ready and trained to step in and take over	 Formal plan developed by Sep 2014 		
5.3	Attain the Healthy Working Lives Silver award	 Following our efforts to secure the Healthy Working Lives Bronze Award, we will move to the next stage Healthy Working Lives offers mutual benefits to the staff and the Trust alike – staff can enjoy better wellbeing as a result; the Trust will lose less hours as a result of ill-health. 	– HWL Silver Award attained by Feb 2015		
5.4	Initiate efforts to attain Investors in People status for the Trust	We will assess our current position and plan how to attain the award	- Plan developed by Sep 2014		



Key Performance Indicators

In addition to the outputs specified in the preceding pages, we will show progress in delivering our actions throughout 2014 – 2015 via a range of Key Performance Indicators (KPIs). These are defined in the following table:

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

