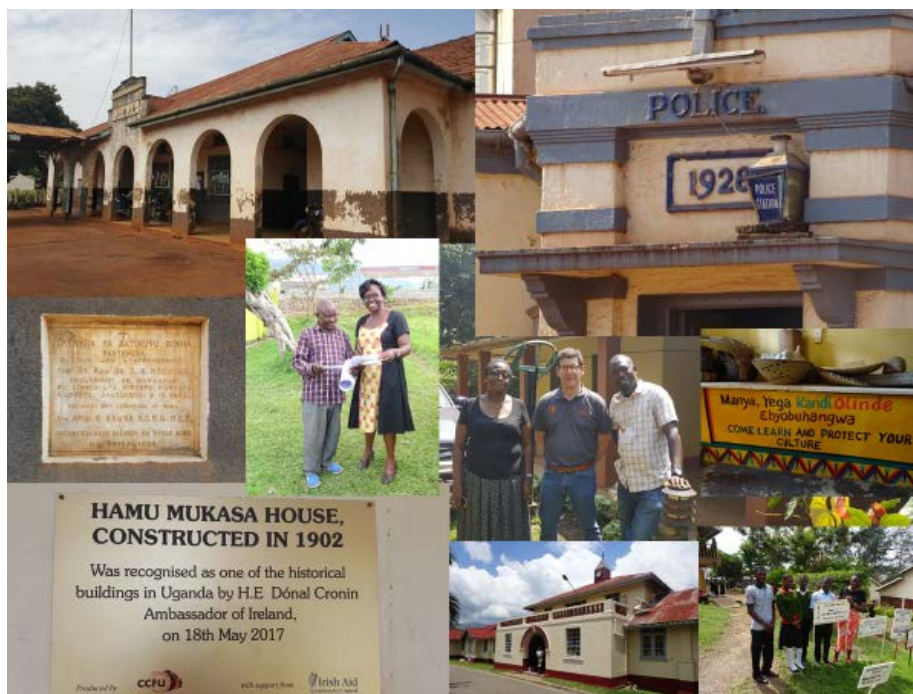


A Study on the Feasibility of a National Trust for Uganda: Final Report April 2020



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1 Introduction

This paper consists of five sections: an overall introduction and background to the paper; an examination of the challenges and opportunities for heritage in Uganda; a section detailing what can be learned from other Trusts that are part of the International National Trusts Organisation family; an exploration of the potential role and structure for a National Trust in Uganda and finally a set of recommendations. As an annex there is list of further reading on Heritage Trusts.

1.1 Background

This report is the final output of a sabbatical placement from the England, Wales, Northern Ireland National Trust to the Cross Cultural Foundation of Uganda. Travel was funded by the TAP INTO scheme whose aim is to support partnerships between International National Trusts Organisation members.

During the placement, the first conference of the INTO Africa group was held in Nairobi. Participating in the conference, and the visit of Oliver Maurice, Specialist Advisor for INTO to Uganda prior to the conference, was extremely helpful in the development of the thinking in this report.

The background and rationale for exploring the need for a Heritage Trust in Uganda is derived from CCFU's membership of the International National Trusts Organisation and the establishment of other Trusts worldwide. During the 2013 International Conference of National Trusts held in Uganda, partners in the culture sector in Uganda had an opportunity to learn about the different interventions made by Trusts from across the globe and proposed at a meeting at the end of the conference that Uganda should consider establishing a National Trust. The Trust would champion Uganda's built heritage, support the owners of historical sites and buildings, and act as an advocate and influencer to help change people's perception towards historical buildings, sites and cities.

In 2015 a Discussion Paper on the establishment of a National Trust in Uganda, written by Arthur Mugisha, was commissioned in the light of the conference. The paper makes it clear that Uganda's built heritage is under threat, particularly, but not exclusively, from rapid urbanisation. The paper (and Verity Ramsden's 2019 National Trust concept paper), show the scale of the issue - the loss of historic sites means a lost connection with a shared past, and a risk of losing these unique features for future generations. This has a negative impact on society's ability to tell stories about people, culture and about the history of the country.

1.2 Scope and Terminology

The relevant objectives of the placement that initiated this paper were to stimulate internal discussions within CCFU on national and international concerns and legislation that may have bearing on the formation of a National Trust and to develop concepts and proposals to implement tentative plans for a National or Heritage Trust.

In the paper, I use both the term 'National Trust' and 'Heritage Trust' – in some senses these terms are interchangeable, but I've used 'National Trust' where I'm referring to a classic property owning Trust model very much in the image of the National Trust for England, Wales, Northern Ireland and The Trustees of Reservations. Both of these institutions were founded in the late 19th century in an age of philanthropy and rapid (some might say breakneck) urban development. I use 'Heritage Trust' as a much more generic term, referring to an NGO that might or might not own property. Both terms aren't

without their drawbacks: a focus on 'National' can either be seen to be 'stepping on the toes' of government or signalling that a Trust is actually an arm of government ("National Railways", "National Museum"). The word 'Trust' can also be confusing as in some contexts it can be understood to be a financial vehicle – a trust fund. Moreover, this sense of Trust as a Trust for the nation doesn't readily translate from English. The term 'Heritage Trust' though is in danger of being such a generic term that is difficult to define.

A final observation at the outset, is that there is a certain sense that to be a 'proper' National Trust, organisations must emulate the classic National Trusts i.e. membership led, property owning, large scale organisations independent of government but empowered by Act of Parliament. A theme of this paper, though not its purpose, is to explore the relevance of this thinking in the developing world and particularly in sub Saharan Africa. Further to that, this sense doesn't seem to completely reflect the history of these 'classic' Trusts – to take the E, W, NI Trust as an example, in its early life it was neither a national institution nor particularly concerned with being a membership organisation per se – in its first 40 years of existence membership was never more than 850 - "in the society of the late 19th C it filled a necessary role. Individuals undertook a task that government would not shoulder and could not have attempted in the face of public indifference" *The Continuing Purpose* Robin Fedden.

1.3 Methodology

In thinking about the options for creating a National Trust:

- I have researched and summarised the recommendations from previous reports and previous stakeholder engagement.
- I met with a number of stakeholders and asked them about the challenges and opportunities for Heritage and what was needed from a Trust to address them.
- I have summarised the challenges that are being faced for the protection of built heritage in Uganda as well as the opportunities.
- The first draft of this paper was then discussed with CCFU stakeholders, its staff team and Oliver Morris, Specialist Advisor for INTO, with their comments & suggestions incorporated into the paper.
- Discussions and impressions from the first INTO Africa group meeting in Nairobi in February 2020 have informed the paper.
- I have briefly described a "classic" National Trust; then looked at the organisational models of other INTO members; the background to the creation of their organisations and their areas of focus to understand what can be learnt from the wider INTO family.

1.4 Deliverables

This paper discusses and summarises the challenges faced for the preservation and promotion of heritage in Uganda and looks in some depth at what lessons can be learnt from the wider INTO family. It examines the need or otherwise for a separate Heritage Trust to CCFU and makes a number of recommendations about the next steps for the organisation.

From the outset though, there are two factors to highlight that have further informed my thinking:

- In Uganda, as elsewhere, there is a misunderstanding of what a Trust actually is – it seems often to be understood to be a financial trust that is set up to fund delivery of conservation work. I do

not want to labour the point here, but some of the enthusiasm for a Trust may be coming from a perception of it as a vehicle purely for bringing in funding. Meetings with the Wildlife Conservation Society and Uganda Biodiversity Trust have been really useful in exploring the opportunities and challenges of a financial trust, but I'm clear that it is not the role of the proposed Trust, although we can learn from these organisations.

- In the literature on Heritage Trusts (such as it is – see further reading - the best source is the International National Trust Organisation), there is good information on the various organisational models (and outputs) but on the central question of property ownership there is little detail on the differing models of ownership / operation that Trusts use. I think this is important as in conceptualising a property owning Trust there are a number of methods for “owning” property that might be more or less useful in this context.

In short, from the beginning, I am observing that the phrase ‘we want to create a National Trust’ can in practice mean very many different things.

2 Challenges & opportunities

2.1 Introduction

This is not the place to discuss differing critiques of the role and value of built heritage, but I am conscious of the need to avoid any suggestion that built heritage is irrefutably a good thing and that those who don't value it are somehow misguided. This is germane to my eventual recommendations - from the outset it is worth recognising the lack of value placed on built heritage (“old buildings”) in contemporary Ugandan society. There is a widespread perception that a city must have ‘modern’ buildings, and that retaining cities’ historic buildings is backward and embarrassing. This is driven by a number of factors that could be a significant study in themselves: a cultural focus on intangible heritage, a desire to discard an embarrassing past, a lack of a universal national narrative and most especially a drive to escape poverty. In short built heritage can be something to escape rather than celebrate.

This analysis is reflected by the other members of the INTO Africa group (indeed there are comparators to this feeling in, for example, post-independence Ireland and post-cold war Eastern Europe). This primacy of modernity and economic development also impacts natural heritage as the cartoon below suggests (Murchison Falls is a spectacular waterfall on the River Nile, in the past proposals have been considered for the building of a hydroelectric dam):



Alongside this, bearing in mind the importance to the economy of tourism, the loss of built heritage also damages the potential for the development of heritage based tourism. This does seem self-evident, but I have no evidence for the extent or potential of built heritage tourism, and certainly there is an obvious focus in Uganda on natural heritage tourism considering its assets / advantages in this area. The need for intelligence on the potential for built heritage tourism is a next step from this paper.

With all that said, for the present paper we can assume that a. built heritage is a “good thing” and b. for any number of reasons it is under threat in Uganda, but one should be mindful that this view is not shared in the public at large.

2.2 Background

In the 2015 Discussion Paper, it was recommended that the overall objective / purpose of a Ugandan National Trust should be to safeguard for posterity Uganda’s historic buildings and sites, and that the Trust should cover the whole of Uganda, rather than a specific city or region. It was emphasised that all eras, and all cultural/national backgrounds of building should be included in the Trust’s remit (i.e. buildings and sites which represent the different kingdoms, ethnic groups, and the colonial period).

In the 2015 stakeholder interviews, and in my more recent ones, there was huge enthusiasm for, and huge expectations of, a National Trust. All the people interviewed strongly felt that it was high time that Uganda established a National Trust, despite some evidence of a lack of understanding as to what a Trust is. A clear need to involve government in any proposals was often expressed, particularly if it was possible to establish a Trust under an Act of Parliament, but also the desire to ensure independence and autonomy for the Trust to manage its own budget and make independent decisions was expressed.

This relationship with government, particularly if an Act of Parliament is not possible or even desirable, could be that a Trust can help government with the ‘burden’ of heritage management (in common with

many countries) but not be an arm of government – in short, it should have a ministerial home but be independent of government. This relationship might start slowly, to build support and trust with government. As an aside, this type relationship is of course common in many countries, where NGOs work extensively in the cultural sector. Interestingly, I can see no discussion of the appropriateness of this “Anglo Saxon” model of heritage management where the ownership, care & operation of heritage sites is devolved to NGOs from Government (as opposed to a continental European model where the state largely owns and operates heritage attractions).

This omission confirms that previous discussions have taken place against a background of a sometimes hazy understanding of what a Heritage Trust actually is. This is understandable – the literature on “Trusts” is scattered (the most important work on summarising this is the INTO handbook), the literature can be dominated by references to the England, Wales, Northern Ireland Trust (whose scale is dramatically different to any other Trust worldwide) and, as I have said, even the word “Trust” is often taken to mean a financial trust.

Since the 2015 paper, CCFU’s work concerning built heritage has increased, as has the urgency of the fight to protect Uganda’s historical buildings and sites. CCFU does seem a natural leader (perhaps ‘incubator’) of a Heritage Trust, but this is balanced with the danger that CCFU’s capacity (and good name) could be diluted or damaged by developing a Heritage Trust. Hence the central questions to be answered - there is a clear feeling that “some thing needs to be done” and, at a national scale, but

- What is the ‘thing’ that needs to be done?
- Is CCFU best placed to lead / incubate this thing?
- If a Heritage Trust is the answer what form should it take?
- Where would the funding and expertise come from for its work?

In short, to quote a member of the CCFU team: “what is this thing and what will it eat?”

2.3 Challenges

In my meetings with stakeholders, I asked what the challenges and opportunities are for built heritage in Uganda. I also asked what CCFU or a Trust could do to address these.

The common themes in the challenges and opportunities won’t come as any surprise and were referenced by many stakeholders. The documents I’ve read, further conversations with the CCFU team and the stakeholder engagement day have reinforced them. I can’t say this is an exhaustive list (and necessarily it is Kampala biased) but it does seem to reflect the overall picture.

Interestingly, although I didn’t ask it as an explicit question, there was no reference in any of the meetings to learning from other African countries and the challenges they are facing, except in the discussions with Kampala Capital City Authority who did mention a desire to share experiences on urbanisation / town planning.

However, in the stakeholder day, cooperation and learning from other countries was suggested as an output for the Trust.

The challenges are:

- Funding, funding, funding: the need for investment in heritage.
- Government focus is on overall income generation and (understandably) heritage tourism is secondary to wildlife-focussed tourism.
- With this focus, without clear evidence that heritage is income generating, cultural heritage will be “right at the bottom of the pile” [although this is true in the developed world as well].
- Out of date legislation - laws that exist to protect historical buildings and sites in Uganda are out of date and insufficient to match the speed of development. There needs to be a legislative framework that flows from central to local government.
- Progress is needed on a model for gazetting built heritage – the situation is not as simple as the European model that started with broad-brush listing by age of building or scheduling “ancient” sites.
- Frustration that, in the absence of a dedicated ministry, ‘Culture’ is split between several government bodies (Ministry of Gender, Labour Social Development; Ministry of Tourism Wildlife and Heritage as well as the Ministry of Lands and Urban Development) [although, this is the same in many countries].
- Extraordinary high land values in cities [although there are few example of direct Trust ownership in capital cities in INTO, suggesting other methods of protection are appropriate for capital cities].
- ‘Development’ is seen as a higher priority than cultural heritage in society at large.
- The lack of heritage / cultural education and skills at all levels, indeed that built heritage is seen as an embarrassing symbol of the past.

2.4 Opportunities:

- Enthusiasm for the recent Kampala Capital City Authority draft Historic Buildings ordinance.
- As well as enforcing legislation, a desire for models that can incentivise conservation.
- Influencing education in primary, secondary and tertiary – there was great enthusiasm for heritage clubs.
- Building a culture of fundraising (private donors) – linking culture to other programmes.
- Working with regional museums and the kingdoms.
- Huge enthusiasm for the proposed university heritage studies degree programmes – this can also generate research / “placement work” (e.g. collections cataloguing) and the students can act as change agents.
- Working with tourism agencies esp. Uganda Tourism Board [interestingly the private sector wasn’t mentioned].
- Whether there is a role for a National Cultural Forum as suggested in the Uganda National Cultural Policy.
- Revision of the Historical Monuments Act of 1967.

2.5 SWOT:

I’ve summarised these challenges and opportunities below in a Strengths, Weaknesses, Opportunities Threats table.

<p>Strengths</p> <ul style="list-style-type: none"> • Stakeholders’ (Civil Society) willingness – it is their idea • There is a cause – built heritage demonstrably under threat • Growing tourism – so some built heritage potential • CCFU’s increased work on built heritage 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Lack of understanding what a Trust is • Roles of Government departments and NGOs unclear • Little general public appreciation of (built) heritage • Lack of progress on gazetting
<p>Opportunities</p> <ul style="list-style-type: none"> • Enthusiasm for the KCCA ordinances. • Incentivising conservation • Legislative reform • Education at all levels • Fundraising • Regional museums and traditional rulers • Collaboration with tourism agencies 	<p>Threats</p> <ul style="list-style-type: none"> • Weak legislation • Low central government motivation / focus on income generation • Fast paced urbanisation • Fundraising / Funding • Lack of cultural and heritage education

3.What can be learnt from the INTO family?

3.1 Introduction

In this section I summarise the common features of Heritage Trusts, the background to their formation and their areas of focus. I also look at property ownership and membership in more detail. It is important to examine these areas to understand what elements of a Heritage Trust are relevant to Uganda (and indeed sub Saharan Africa more generally).

3.2 What is a Heritage Trust?

Heritage trusts are generally property-owning conservation charities (not-for-profit organisations) and are generally independent of government but work in various degrees of collaboration with, or regulation by, government (including by Act of Parliament). They vary in scope from local (one site) through area, city to national remit. Where they own property, the fundamental concept is that by owning property (no matter what the actual building is used for) a Trust can protect and conserve it, regardless of the statutory protection the building / land may or may not have.

The fundamental property ownership can be “operated” through a number of models (see section 3.6 below) and can even mean owning property temporarily (in essence conserving the building and then reselling it to a benign owner). For the E, W, NI Trust there is firm statement that ownership is “on behalf of the nation” (which in effect is ‘contracting out’ / ‘taking the burden’ from government), but it

is not uncommon for Trusts to be NGOs set up by government to operate (but not own) heritage sites. They are clearly different to biodiversity trust funds and are very rarely (unless taking on this role for government) funders of conservation work for others to deliver but do offer advice for others.

Heritage Trust Governance is through trustees and boards and there are examples of wider “councils” that encourage community participation and the involvement of other interested NGOs. Competition from other types of civil society organisations is not infrequent in the sense that they are not the sole operators of, or advocates for, heritage sites. In many countries they benefit from (or lobby for) tax incentives to benefit heritage: this could be exemption from value added taxes, inheritance tax regimes or “top up” taxes (for example tourism taxes, lottery grants).

To a greater or lesser degree, they develop policy to influence government (both local and national). Some benefit from volunteering but this driven by the larger volunteering culture within which they operate. Whether property owning or not, they involve people in conservation, generate public interest in conservation and shape public opinion.

Trusts can operate a separate trading arm (“enterprises”) but this is only a significant income source in the larger trusts, compared to grants, project funding, legacy and endowment income. Membership is a key part of a heritage trust, but it takes two forms. The first is a subscriber / supporter model where there is little practical benefit to the member: the membership fee is in effect a ‘donation to the cause’. The second is a more transactional relationship where the member receives free entry to the Trust owned properties.

Trusts share skills, advise on and research conservation issues, commissioning reports and research. Across most Trusts there is significant activity on formal education / youth engagement. They generally do not list / gazette buildings (though do campaign for listing) and do not enforce legal protection (but again can campaign for it).

3.3 The background to their formation:

It’s dangerous to make sweeping statements across many countries, but in simple terms, looking at the history of the formation of Heritage Trusts both in and outside the INTO family, there are a number of spurs to their creation, or at least there were a number of common currents (precursors) in society that led to their creation.

These precursors also led to the creation of bodies that, though heritage advocates, are dissimilar to a Trust: examples from the UK are the Society for the Protection of Ancient Buildings and the Council for the Protection of Rural England. Both SPAB and the CPRE were created in the same era as the E, W, NI Trust (and considered property ownership as a function) but their focus settled on what we would now call advocacy. Although created in the 21st Century the Heritage Alliance, an alliance of all heritage interests in the UK, performs a similar role, though with a wider remit, as these two organisations. Finally, created in the mid-20th Century, the Historic Houses Association is an umbrella body for private owners of built heritage and advocates for (and promotes) its members interests.

The figure below lists five common precursors to the creation of Heritage Trusts:

- Government cares about Heritage (or at least can be pressured to be seen to care)
- Heritage Civil Society actors exist (or can be rapidly formed)
- At least some sections of the public value heritage objects / sites
- There is a public threat to, or crisis in, a valued site
- Some non governmental funding sources exist (often individual philanthropy)



Government priorities:

Culture or heritage rarely feature at the forefront of government thinking, but the creation of a Trust hasn't happened in the face of complete government indifference, there needs to be some interest from government. This can range, at minimum, from government being pressured (either by civil society or individuals within government) to at least be seen to care about heritage, to a more nuanced sense of 'patrimony', where government uses (explicitly or unconsciously) heritage to create a sense of national identity. More recently conflating heritage protection with tourism development (and therefore economic growth) has been successful in influencing policy.

Civil Society existence and the power of civil society:

The power and role (even the existence) of civil society actors is culturally driven. In societies with a tradition of civil society, government naturally looks to them to enable heritage protection. Where strong state involvement is more natural, government retains heritage protection for itself and the population expect this.

Public valuing built heritage:

As mentioned elsewhere, the relevance of cultural heritage to the public is a key driver in its protection (if you feel heritage is relevant, you become interested in its protection and celebration). That said it can be a 'chicken and egg' situation – Trusts have been formed in the face of public indifference and by their existence have influenced public sentiment. But at minimum, there needs to be a number of influential individuals in civil society to drive the formation of a Trust.

Threat to heritage:

Linked to the above point in very many cases there is a flashpoint that spurs the creation of a Trust where a particular natural or cultural site ('national treasure') is under threat. Two examples of this are: in Uganda the campaign to save the Mabira Forest which created a huge groundswell in a public that more than usually was ambivalent about the development of natural resources; and in the UK the exhibition "The Destruction of the Country House 1875 - 1975" which reversed the perception of the 100 years of largely unremarked destruction of the English Country House.

A final precursor, though not always seen, but that would seem to have relevance in the 21st Century, is a belief in protecting green space for health and aesthetic reasons. This desire is evident at the foundation of the older Trusts and how it manifests is largely culturally specific (in the UK it was heavily influenced by the Romantic movement, for example).

In modern times, it resonates with concerns about climate change particularly in young people (a worldwide phenomenon), and suggests that the link between, particularly natural heritage protection and climate change, could be a spur for the public valuing heritage.

What I am suggesting is that before deciding to create a National Trust in Uganda (or elsewhere) it is worth considering if the necessary pre conditions are in place. More specifically, this doesn't preclude the creation of a Trust, but suggests that in Uganda, bearing in mind the time and resources needed to create a separate National Trust entity, CCFU's focus could be on influencing a general regard for cultural heritage in Ugandan society. Further to this, these precursors can guide the focus for CCFU to advocate for heritage: for example, concentrating on an immediate threat to a property or focusing on projects in education that engender a feeling of care for cultural heritage.

3.4 Generating public interest in heritage

How the public at large become interested in heritage protection is an area of study in itself but there are a few relevant points to summarise from the developed world.

In the UK concern for heritage was a reaction (initially in the upper classes) against urban and industrial development. In 1877, William Morris, noted that '*no doubt within the last fifty years a new interest, almost like another sense, has arisen in these ancient buildings.*' This reflected a change from seeing industrial development as 'beautiful' and natural (see the 1777 Painting *Morning view of Coalbrookdale* below) to horror at the speed and impact of economic development.



There was also resistance to the modernisation ('improvement') of old buildings engendered by a Romantic view of a (largely fictional) rural idyll.

In the UK this took the form of legislation in the 1882 Ancient Monuments Protection Act, although conservation still relied to a large extent on wealthy educated landowners or groups brought together to fight a particular cause. The tangible loss of buildings in the second World War was a major impetus for the conservation of heritage, and in the UK led to the transformative 1947 Town and Country Planning Act, giving statutory protection to 'listed buildings' of particular architectural merit.

Alongside the increasing statutory protection, the public at large became more interested in heritage in this period driven by a number of factors: the pervasiveness of 'history' in popular culture (making the past seem tangible and realistic) and this positive perception of the past coupled with the growth of railways stimulated domestic middle class tourism. There was also a sense that an interest in history was 'self-improving' and an essential part of education. Also, very simply, slow improvements in working conditions created more leisure time (for example in 1938 legislation was passed to give all workers one paid weeks holiday a year).

Crucially alongside this was the sense of patrimony - the use of heritage to promote a national identity, pride and social cohesion. In whose interest this narrative was created is again beyond the scope of this paper but has been written about extensively by Laurajane Smith amongst others.

The creation of Heritage Trusts in the developed world at a time of steep economic growth would seem very relevant to the role of Trusts in the developing world.

3.5 Characteristics of Heritage Trusts

As I have said, there is a sense in some of the literature that a Heritage Trust must own property but there are many characteristics of Heritage Trusts beyond property ownership.

The variety and complexity of these characteristics can be summarised in the model below - an adaption of a model in June Taboroff's feasibility study for a Heritage Trust in Hong Kong.

Characteristics of Heritage Trusts

Characteristics	Degree of complexity				
	← international	national	regional	local / city	→ single site
Geographical Remit	international	national	regional	local / city	single site
National Heritage Policy	setting policy as part of government	designing policy tools	statutory consultee on policy decisions	advocate for heritage policy	monitors relevant policy
Protection of Heritage Sites	responsible for gazetting / listing	identifies properties for gazetting / grading	formulates policy on gazetting & protection mechanisms	advocates for gazetting of individual properties	reactive to own interests
Conservation of non owned sites	advice, training, resource mobilisation & direct funding	partnership working / identification of at risk sites / mobilises funding	advocacy for properties / enables funding	advice & information	none
Advocacy	Substantial public engagement through property ownership / strong influencer of public opinion	campaigns, publications / significant formal education	localised campaigns / media / commitment to education	specialist advocacy	focus on own specialism
Research & Technical advice	commissions academic research, employs specialists, completes conservation work	substantial publications & advice documents	advocacy publications	specialist advice	none
International Networking	national focal point for national heritage & liaison with overseas stakeholders / shares best practice	focal point for liaison of like minded organisations / shares best practice	ad hoc participation in international events	only on specialist interests	purely domestic
Property / Land ownership	Substantial ownership / can hold inalienably / autonomous control of own land	medium scale ownership / holds government property	some ownership but not key organisational focus	small scale ownership - local or specialist sites	no property ownership
Funding Model	generates own funds / benefits from charitable giving & tax incentives	precarious / site focussed	project led / donor funding	substantially government funded / some generation of funds	government body
Role of membership & heritage sites	operates many sites / significant member benefit and income	some sites & member benefit, strong income stream	membership based on advocacy, few sites, important income	supporter member model, cause based membership	no membership

On the vertical axis of the model are the key characteristics of a Heritage Trust – what geographical area it covers, for example, the amount of property ownership or provision of technical advice. These characteristics also describe such things as the funding model of a Trust and its role in the statutory protection of heritage sites.

The degree of complexity on the horizontal axis describes the complexity of the characteristic (not the Heritage Trust). For example, the simplest model of funding is to be solely government funded, whereas the most complex would be a large NGO with multiple income streams. Similarly, involvement in statutory protection would be at its most complex for a government department setting and implementing national policy, whereas the simplest would be an organisation purely responding to its own interests.

When the model is “scored” for a number of individual Trusts (see below an example for the Seychelles Heritage Foundation) it’s clear that different Trusts have different characteristics and degrees of complexity – there is not a ‘one size fits all’ model for Heritage Trusts. A Trust purely funded by government might have a very simple funding model, a very small advocacy role, but a complex role in training and resourcing others in conservation. Likewise, a Trust might have substantial property ownership, operate many visitor attractions but have no role in the conservation of sites it doesn’t own.

This suggests that the activities a Trust undertakes and the degree to which they undertake them reflects their organisational status and the demands of the environment they work in, not an overarching model of a Heritage Trust. An organisation develops (consciously or unconsciously) characteristics that reflect the political, economic & social environment they work in: where most heritage sites are operated by government a Trust might focus more on advocacy and international networking. Further to this, the characteristics (areas of activity) of an organisation can change over time. For example, a government funded Trust might have significant property ownership as well as many other of the characteristics but if the operation of heritage sites were to be given to an NGO, its focus would become much narrower.

The model could also help Trusts to understand where they can add most value. By scoring their existing activity and asking where the organisation would like to increase the extent of its remit or limit the scope of their work to respond to changes in the political and economic climate, it can be used to shape the future shape of the organisation – indeed if a wide selection of INTO members were scored on the table, this could help more closely identify mutual support between similar organisations.

Characteristics of Heritage Trusts – Seychelles Heritage Foundation

Characteristics	←		Degree of complexity		→
Geographical Remit	international	national	regional	local / city	single site
National Heritage Policy	setting policy as part of government	designing policy tools	statutory consultee on policy decisions	advocate for heritage policy	monitors relevant policy
Statutory Protection of Heritage Sites	responsible for gazetting / listing	identifies properties for gazetting / grading	formulates policy on gazetting & protection mechanisms	advocates for gazetting of individual properties	reactive to own interests
Conservation of non owned sites	advice, training, resource mobilisation & direct funding	partnership working / identification of at risk sites / mobilises funding	advocacy for properties / enables funding	advice & information	none
Advocacy	Substantial public engagement through property ownership / strong influencer of public opinion	campaigns, publications / significant formal education	localised campaigns / media / commitment to education	specialist advocacy	focus on own specialism
Research & Technical advice	commissions academic research, employs specialists, completes conservation work	substantial publications & advice documents	advocacy publications	specialist advice	none
International Networking	national focal point for national heritage & liaison with overseas stakeholders / shares best practice	focal point for liaison of like minded organisations / shares best practice	ad hoc participation in international events	only on specialist interests	purely domestic
Property / Land ownership	Substantial ownership / can hold inalienably/ autonomous control of own land	medium scale ownership / holds government property	some ownership but not key organisational focus	small scale ownership - local or specialist sites	no property ownership
Funding Model	generates own funds / benefits from charitable giving & tax incentives	precarious / site focussed	project led / donor funding	substantially government funded / some generation of funds	government body
Role of membership & heritage sites	operates many sites / significant member benefit and income	some sites & member benefit, strong income stream	membership based on advocacy, few sites, important income	supporter member model, cause based membership	no membership

3.6 Property Ownership:

There are a number of models of Trusts within INTO with very little property ownership - substantial property ownership is not a common denominator of all the INTO members, but it does feature at the heart of the operations of some Heritage Trust models.

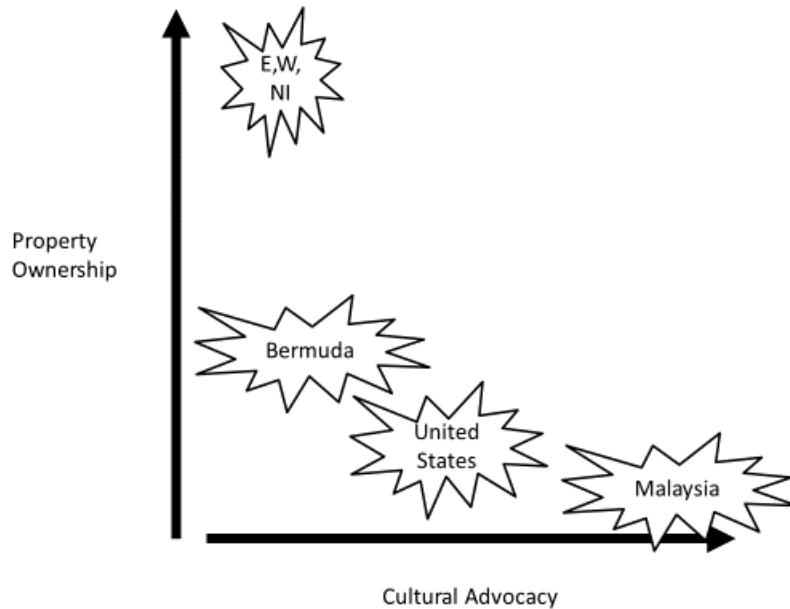
Ownership by a Heritage Trust does not necessarily mean that a property is operated as a visitor attraction, there are other models of ownership that are used to protect built heritage and to promote heritage.

Some other models used across INTO are:

- A building is owned and conserved to demonstrate best practice.
- Land and residential buildings that are rented to private individuals with no or limited public access, but repairs and maintenance are still the responsibility of the Trust.
- Land and residential buildings leased to private individuals who take responsibility for repairs and maintenance as guided by the Trust.
- As above but to another organisation for commercial use (e.g. a hotel or a theatre).
- Adaptive reuse / modernisation – a ruined building is acquired and refurbished for a new use by the Trust – for example as offices, residential or holiday accommodation.
- As above but the building is subsequently sold to a 'benign owner'.
- The Trust leases / rents a building from another organisation to operate as visitor attraction.
- The custodian model – an individual lives in a building rent free but has an obligation to open the building in a limited way to visitors.
- The Trust owns the building but appoints a committee from the community to operate it as a visitor attraction.
- Covenants – the Trust doesn't own the land but has a degree of legal control over the property.

As we can see working in partnership with others can produce the same result as a Trust operating the building themselves and lessens the risk of ownership.

The degree of ownership, and the focus on activities that promote heritage other than by owning properties (advocacy), across INTO can be made in the simple graphic below. Some INTO members regardless of size are plotted on a matrix that describes their degree of property ownership and their focus on cultural advocacy.



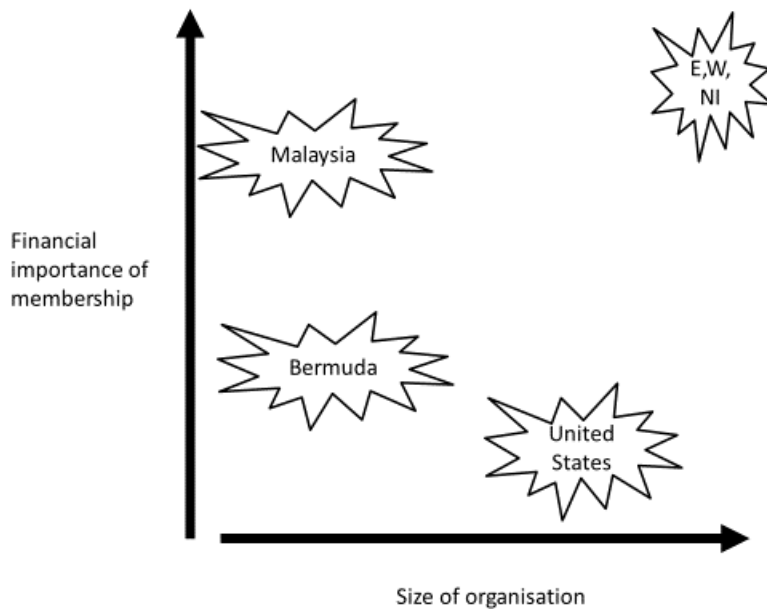
This shows the variety within INTO from the Badan Warisan Malaysia (the Heritage of Malaysia Trust) who own 2 buildings to the England, Wales, Northern Ireland Trust that alone owns 780 miles of coastline, 248,000 hectares of land and more than 500 historic houses, gardens and parks.

This is not necessarily a reflection of the ages of the Trusts, more that their degree of focus on ownership or advocacy reflects the cultural, political and economic climate they work in – in many cases advocacy (in the broadest sense of the word) is a more effective tool for the protection and promotion of heritage than ownership.

Further to that, for the E, W, NI Trust, by far the biggest Trust in INTO, particularly in its early years, there was a deliberate focus on its role as a property owning body as opposed to advocacy: “[by 1925] there was a gradual disengagement from issues in which it was not directly involved... the Executive committee discussed at length ‘how far the Trust should engage in work on a militant character, as opposed to its functions as a holding body’” *The Continuing Purpose* Robin Fedden.

3.7 Membership

If property ownership is not a necessary part of being a Trust, is membership? Taking the same four organisations already mentioned, we can plot the importance of membership as an income source (% of annual income) against the size of the organisation (number of employees).



For the E, W, NI National Trust with 6 million members (NB this is members not memberships, a family membership with 2 adults and 2 children is counted as 4 members) generating in excess of £200m income, membership accounts for a third of total income. The membership relationship is largely a transactional one, providing cost effective admission to in excess of 350 visitor attractions nationwide.

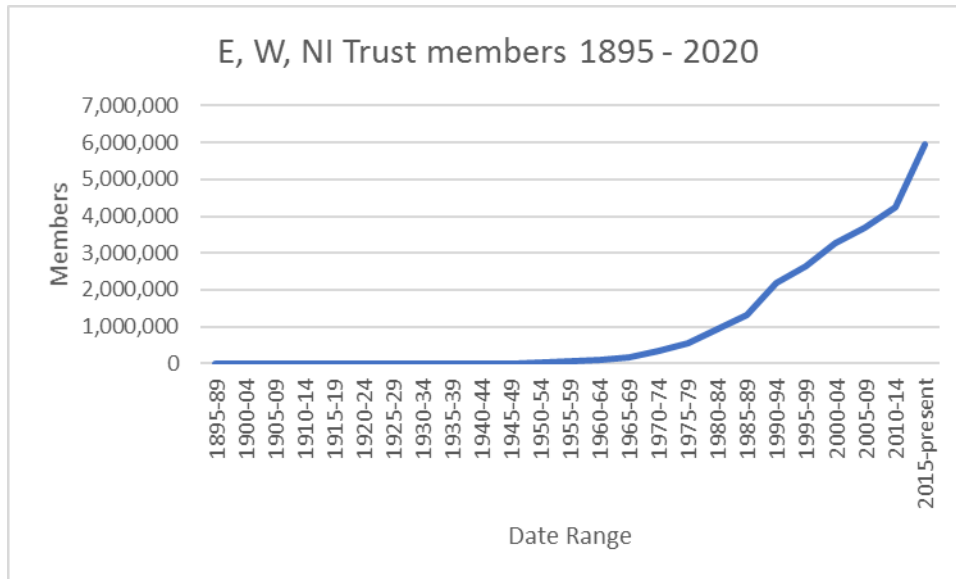
Looking at the Heritage of Malaysia Trust, membership is more like joining a club or society, legally being ordinary members of a company limited by guarantee. With two properties, benefits of membership extend to discounts for events and special tours, but the main driver of membership is a “subscriber” model – membership is a gift towards the protection of heritage.

For the Bermuda National Trust, with 83 properties but a relatively small domestic population, the income derived is not as significant (48% of their income comes from rental properties). Although membership has significant transactional (property visiting) benefits, it is very much promoted as a donation to protect National Heritage.

The United States Trust for Historic Preservation has a small number of properties (27), but crucially are also a funder of conservation and heritage promotion in non-owned properties. Their membership proposition does have transactional benefits: as well as entry to those 27 properties, it offers discounted admission to a network of attractions nationwide. Membership revenue, however, is only 2% of annual income (compared to private donations, legacies and corporate donations accounting for 25% of annual income, a similar figure to the E, W, NI Trust).

How membership leads to donations and legacies is a fruitful area for investigation (E, W, NI Trust has statistics on this) but beyond the scope of this paper.

Finally, these figures are 'gross' (i.e. do not reflect the cost of recruiting & retaining membership) – net figures are not easily calculated but there are two points to make. The Trustees of Reservations have publicly said that they make a net loss on membership but continue the programme as an advocacy tool. As opposed to this (see graph below) the exponential growth of E, W, NI Trust membership in modern times is very profitable: at scale, the incremental cost of recruiting new members is negligible.

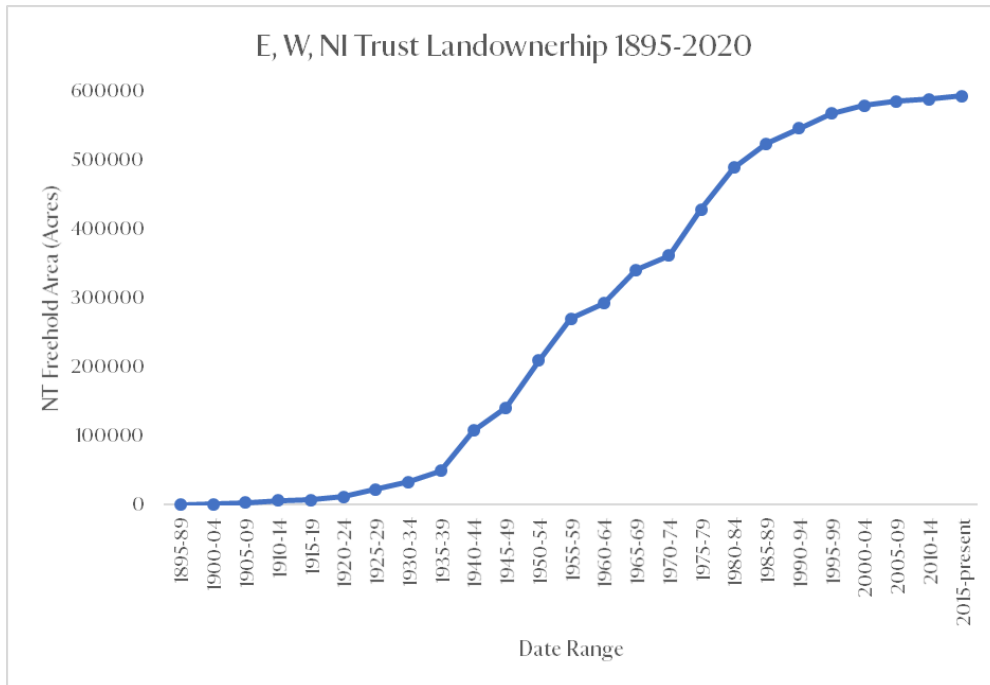


This phenomenal growth is worth commenting on: membership growth starts in the 1970s and is accounted for by external and internal factors. Externally, changes in society meant that in the 1970s the country was increasingly prosperous, and with a further reduction in working hours, had more leisure time (particularly for the middle classes). The cost of transport lessened and became easier, while the growing concern for historic and natural environment (and the 'green' movement more generally) made membership more attractive.

Within the organisation there was a change in culture and the gradual professionalisation of the Trust. After the growth in property ownership (as shown by the growth in land ownership shown below) particularly in the post war years, the Trust certainly had a sufficient number of properties to make membership attractive (at minimum on a purely on a transactional basis). The culture within the Trust moved away from an upper class, quite disdainful attitude to the public - as late as the early 70s a senior official was quoted as remarking 'You must realise the Trust has nothing to do with people' (quoted in *From Acorn to Oak Tree* - Jennifer Jenkins). As this culture softened the Trust professionalised the marketing and operation of the organisation (for example simple things like providing toilets & cafes at its properties to using technology to sell and retain membership).

In essence E, W, NI Trust membership became a leisure activity that also supported heritage. The astonishing growth in membership in the last decade resulted from a further professionalisation of the Trust, more sophisticated marketing of membership and a focus on improving the fundamental service experience of visitors to the properties.

Though not relevant to the present paper, it is interesting to speculate if the huge growth in membership from the 90s has a causal relationship to the slowdown in acquisitions.



Very simply put membership is a ‘tool’ to be deployed as appropriate to the circumstances of the individual Trust.

4. Potential Role and Structure of a Uganda National Trust

4.1 Introduction

Below I list suggestions of activities for a Uganda Heritage Trust: the first section is from my interviews with stakeholders, the second from Verity’s paper. These suggestions aren’t weighted but are presented as a ‘menu’ of activities that I will draw on in my recommendations. I move on to look at the pros and cons of creating a separate organisation to CCFU and then summarise the relevant learning from the INTO Africa group.

4.2 Activities and Objectives for a Trust

When I met with stakeholders and in the stakeholder engagement event, I asked ‘what is actually needed from a Trust?’ The responses are summarised below and were repeated across the meetings:

- Funding, funding, funding, specifically enabling access to funding rather than direct funding.
- To influence formal education.
- Either on its own, or with partners, promoting cultural heritage domestically and to overseas tourists.

- Some sense of establishing an income generating exemplar project – Kenya’s World Heritage Site Fort Jesus was mentioned several times.
- Recognition of CCFU’s expertise and credibility as an advocate for heritage.
- Mobilising or coordinating civil society.
- Advocating for the role of civil society more generally.
- Working with and influencing Local Government - many noted that “culture” is a decentralised service.
- Building International links.
- Acting as an ‘incubator’ / umbrella organisation for other heritage groups.

Critically, in no report or conversation, nor in the stakeholder day, was it said that “what we need is a body to own property”.

Verity’s 2019 paper suggests a number of potential activities that can have a positive influence for Heritage. Again, these activities are not weighted or prioritised.

1. Education and awareness-raising

- a. Open house/site days
- b. Tours / Art installation
- c. Lectures and other outreach events including World Heritage Day
- d. School and university programmes
- e. Heritage awards
- f. Active media and social media presence
- g. Vocal and visible activism for built heritage causes

2. Research and documentation

- a. Audit and documentation of Uganda’s historical sites and buildings
- b. Research and publications

3. Assistance / advisory

- a. Provide support and advice for owners – perhaps through running an owners’ association
 - i. Technical/practical/architectural
 - ii. Economic/financial/marketing etc (help broker private sector partnerships?)
 - iii. Listen to feedback from owners’ association members, as key stakeholders to guide the Trust’s policy advocacy etc.
- b. Provide skills training and best-practice guidance on renovations for craftspeople/builders/architects
- c. Build partnerships with tourism bodies to promote heritage tourism
- d. Work with cultural leaders and regional museums

4. Policy advocacy

- a. Advice / Coordination with government (local and national)
- b. Lobbying / advocacy esp. local ordinances & a National legal framework
- c. Implement government policies? (e.g. government outsource application/enforcement of heritage regulations to the Trust)
- d. Liaison with International Groups

5. Property ownership/management.

- a. Aim to acquire (or occupy) a historical property to renovate and operate as headquarters, to demonstrate conservation
- b. Acquire properties to renovate / maintain and operate them as publicly-accessible sites
- c. Manage (but not own) properties in the public interest

Of these activities, I will suggest in my recommendations the most impactful based on the frequency of their suggestion and how they best address the challenges for heritage protection in Uganda.

4.3 Organisational Structure - a separate organisation to CCFU?

Before recommending activities and priorities, the question remains of the desirability of creating a National Trust as a separate entity to CCFU.

As I have shown, there is a definite need and enthusiasm for a strong voice on (built) heritage in Uganda and there is a desire for a National Trust but with a limited understanding of what a Heritage Trust does. As I have said, there was at no time a clear ask for a 'property holding' Trust from stakeholders, in fact many of the suggestions were, in effect, for more emphasis on work that CCFU currently does.

I've set out the pros and cons below:

Pros of a separate "Trust"	Cons of a separate "Trust"
Taking built heritage projects away from CCFU would lighten CCFU's very heavy workload	In the short term the work involved in setting up a Trust is very time consuming
A separate organisation would be better-placed to act on built heritage with CCFU's core experience being on intangible heritage	A separate organisation reinforces a split between tangible and intangible heritage not reflected in "heritage" current practice
Currently, other (intangible heritage) projects prevent/delay CCFU from undertaking a larger strategic fight to preserve built heritage.	The creation of a separate entity is a dramatic step to solve an internal organisational issue.
Creates a strategy specifically for built heritage	A specific strategy for the protection of built heritage is not so different from a strategy for "cultural advocacy" generally
A new Trust could have a much clearer name, brand and agenda	CCFU has a strong brand - the creation of a new brand could dilute CCFU's brand
A new Trust would be a separate financial entity and therefore 'protect' CCFU from financial risk	The creation of a wholly separate organisation is a big step to mitigate a relatively small risk
A new independent Trust could employ built heritage specialists	Heritage specialists are rare in Uganda, an existing organisation (with good links to academia) is well placed to do this

A new independent Trust could employ commercial specialists (not an existing skill set in CCFU)	CCFU could 'contract out' commercial operations (e.g. café)
Could own property	CCFU can own property
A focus on purely built heritage could allow the Trust to apply for certain funds which may not have been applicable to CCFU	If CCFU is involved in built heritage it can apply for built heritage funding

My concerns about creating a separate organisation to CCFU are:

- It 'hardwires' the split between tangible and intangible heritage.
- As an entity CCFU can own property, so a separate Trust is not needed to perform this function.
- There are many activities as suggested above that can be taken to promote built heritage, short of a concentration on ownership, that relate to CCFU's current work.
- CCFU has a very good name, is politically well connected and does impactful work, perhaps it is better to build on this strength than to create another parallel organisation.

However, as said earlier, CCFU has limited expertise in the management of built heritage. A separate organisation would enable a focus on this developing area without distracting from current projects, but a sub brand within CCFU and a sounding board to help it progress could serve the same purpose.

4.4 The INTO Africa Context

The INTO Africa Group is a regional group of the INTO family, it met for the first time in Kenya in March 2020 - twenty-two people attended the conference, representing 8 countries (Nigeria, the United Republic of Tanzania, Kenya, the UK, the Seychelles, Ethiopia, Zimbabwe and Uganda) and two international organisations (ICCROM and UNESCO).

The objectives of the group that are relevant to this report are to:

- Help emphasise the intangible dimension of heritage within INTO's thinking and practice.
- Provide expertise on community participation in conservation projects and work with youth across the continent.
- Develop National Trust models relevant to the African context.

In terms of areas of focus for the future for the group there was common desire to advocate for the protection and promotion of heritage, as well as work in all levels of formal education.

Looking at these objectives and areas of focus they are areas that Heritage Trusts in the developed world would not necessarily focus on. This sense of common focus on, in the broadest sense of the term, advocacy and intangible heritage was reinforced by looking at the successes from the various

organisations both in their organisations and in their countries more generally. The successes were: in identifying and surveying heritage sites; the participation of both government and local communities in safeguarding sites; developing and conserving heritage skills; different ways of engaging youth in heritage; heritage competitions and awards; working closely with universities and schools; and promoting heritage through awards and heritage maps. There was also success in using cultural resources to conserve the wildlife and their habitat and in the area of cultural rights (for example using culture for women's empowerment or indigenous minority groups' rights). In Nairobi the group saw how public libraries had been renovated, using them as centres of cultural regeneration for local communities.

This is not to say that there aren't examples of more 'traditional' heritage investment (for example the sea defences at Fort Jesus in Mombasa or capitalising on the rejuvenation of railways across the continent), but the non-property owning initiatives were common to all the organisations.

These successes, and the areas of focus, align with much of CCFU's current work, and the priorities for the organisations represented did not include becoming property owning trusts in the near future. This common purpose has guided my recommendations in the sense that there is a common theme in sub Saharan Africa on the areas of focus for heritage organisations to make the most impact.

5 Recommendations

5.1 Introduction

I have divided my recommendations into separate areas: firstly, looking at organisational structure and membership. I then move on to areas of focus for the organisation splitting that focus into workstreams (specific timed activity) and ongoing activities. I also have doubts about the climate for the creation of a Trust – few of the precursors seen in the creation of other Trusts in INTO are present in Uganda.

5.2 Organisational Structure and the role of membership

I have no sense that a separate property owning Trust is either an urgent need nor an obvious next step, and that, learning from other Trusts, working on both advocacy and property ownership is perfectly possible.

My recommendation is that at very least in next two years that a heritage department within CCFU is a preferable option to creating a separate entity - a sub brand within CCFU could be used if it was felt that built heritage work should be kept separate from CCFU's other work. This also gives the opportunity to learn from the current projects (Sir Apollo Kaggwa's home; Jinja Railway Station and Ham Mukasa's House) to inform future decision making. Alongside this a small advisory group could be set up to advise on both the current and future projects and the different style of working these projects will create.

The one circumstance where the creation of a separate Trust should be planned for, is if there were circumstances that led to a wholesale divestment of heritage assets by the State or private owners. This seems unlikely in the medium term.

Regardless of any other recommendation, I certainly agree with the view expressed by a number of stakeholders that CCFU should investigate renting or buying a historical property to renovate and use as CCFUs headquarters.

I also recommend that membership is a 'subscriber model' similar to the model the majority of INTO members have adopted. CCFU simply hasn't currently, nor is likely to have in the immediate future, the volume of property assets even with the current projects to build a transactional membership model. A third way to attempt a transactional membership model would be in partnership with other institutions (for example the Uganda Museum) but this feels a distraction when there are more obvious sources of income and the level of domestic tourism is so low.

This is definitely an area for more research with other INTO members. There are real benefits of a subscriber model both in generating even small levels of income and as an advocacy tool. Developing this model should be informed by advice from other members of INTO.

Not owning property in no way means that CCFU isn't a 'real' National Trust and a developing focus on built heritage can be embedded in the current CCFU staff structure. This also addresses my earlier observation, of which CCFU is of course very conscious, that a distinction between tangible and intangible heritage is an artificial one.

5.3 Areas of Focus

There is a clear need for an advocate for heritage both nationally and locally, this advocacy can be guided by the themes identified in the creation of other Heritage Trusts: influencing government priorities, strengthening civil society, working to increase the value of heritage in the public's mind, and being aware of specific threats to heritage that will attract public attention. These themes can also guide a media and communications strategy.

How campaigns about climate change can be harnessed for the protection of heritage is an area for further exploration.

This report, compared to others, is cautious about the value of a property owning Trust in Uganda. The fundamental thinking driving that caution is a reflection that (tangible) heritage is not valued in current Ugandan society – in fact Ugandan history is sometimes treated with at best ambivalence (and in some cases with a sense of shame or embarrassment). Neither is there a very strong narrative of a 'Ugandan' national identity, although this may change as time passes, and the focus of cultural identity is at local level. This makes an appeal (explicit or not) to patriotism very difficult and the suggested work with local communities and traditional rulers much more attractive.

This pessimistic view is countered by the huge enthusiasm for culture shown in CCFU's Heritage Clubs and the success of heritage promotion initiatives such as the historical buildings & sites maps and app.

Of course, appreciation for heritage in society is a 'chicken and egg' situation: learning from other Trusts, heritage has often been saved by a group of committed individuals in the face of a public indifference that only changes to appreciate heritage once that heritage has been saved. This observation would seem to back the strategy I am suggesting – a focus on advocacy, education, community engagement and 'on the ground' heritage protection. Alongside this the focus on modernity, the discarding of an embarrassing past, is a key feature of Ugandan (sub Saharan) society. The work on media, communications and education is best placed to temper this absolutely understandable focus.

Funding and fundraising came as the central challenge and opportunity for heritage. Poverty lies at the heart of the challenge for heritage - I do not mean this in the simplistic sense that if you are poor you are not interested in heritage, but that in the developing world active care for heritage resulted from a growing economic prosperity. This growing prosperity (even simple elements like the reduction in

working hours or the relative cost of transport) created space to learn about and appreciate heritage. In the absence of growing prosperity, government or domestic funding will always be scarce, so linking the role culture plays in other funding priorities is important.

The opportunity for tourism to fund heritage is often overstated in Uganda – it is a natural income source for the National Parks, but there is only some much tourism income ‘cake’ to go around. Working with the Uganda Tourist Board seems essential to understand the size of the tourism potential and how to target that opportunity effectively. Simply put, it’s unrealistic for all projects to look to tourism to fund their work. One other area to consider would be school visits particularly in the light of the recent changes in the national curriculum (and, needless to say, Uganda’s young population). This has the virtue of generating (small scale) income but also supporting other objectives about educating young people on culture and heritage.

My recommendation is that CCFU focuses on a number of key priorities for the protection of Built Heritage:

- Building capacity and resources within CCFU and others at local level even to the extent of ‘incubating’ local Heritage Trusts.
- Strengthening the portfolio of actual projects and learning from them.
- A focus on media, communications and promotion of built heritage and political advocacy.
- Developing further work in secondary education and the universities.

These broad priorities can be divided into workstreams (planned and timed areas of work) and ongoing activity described below.

5.4 Workstreams

There are seven workstreams I recommend:

1. Advocacy and practical support for legal protection for built heritage both nationally and with local government.
2. CCFU should play a role in the coordination of civil society potentially along the lines of the UK’s Heritage Alliance, this might also lead towards a future role as an ‘incubator’ of local Heritage Trusts.
3. Management and development of the existing heritage projects and the addition of new built heritage projects exploring the variety of operating models outlined earlier - gaining experience of operating projects like these that are different to CCFU’s usual work.
4. Creating and trialling a subscriber model of membership learning from other INTO members.
5. Developing (and continuing to promote earlier work) on the promotion of built heritage (e.g. the Fort Portal map); this includes working with tourism bodies and the private sector.
6. Building relationships with traditional rulers and regional museums and developing their capacity.
7. A close relationship with the new university degree programmes and the role school visits have in promoting and partially funding heritage.

5.5 Ongoing Activities

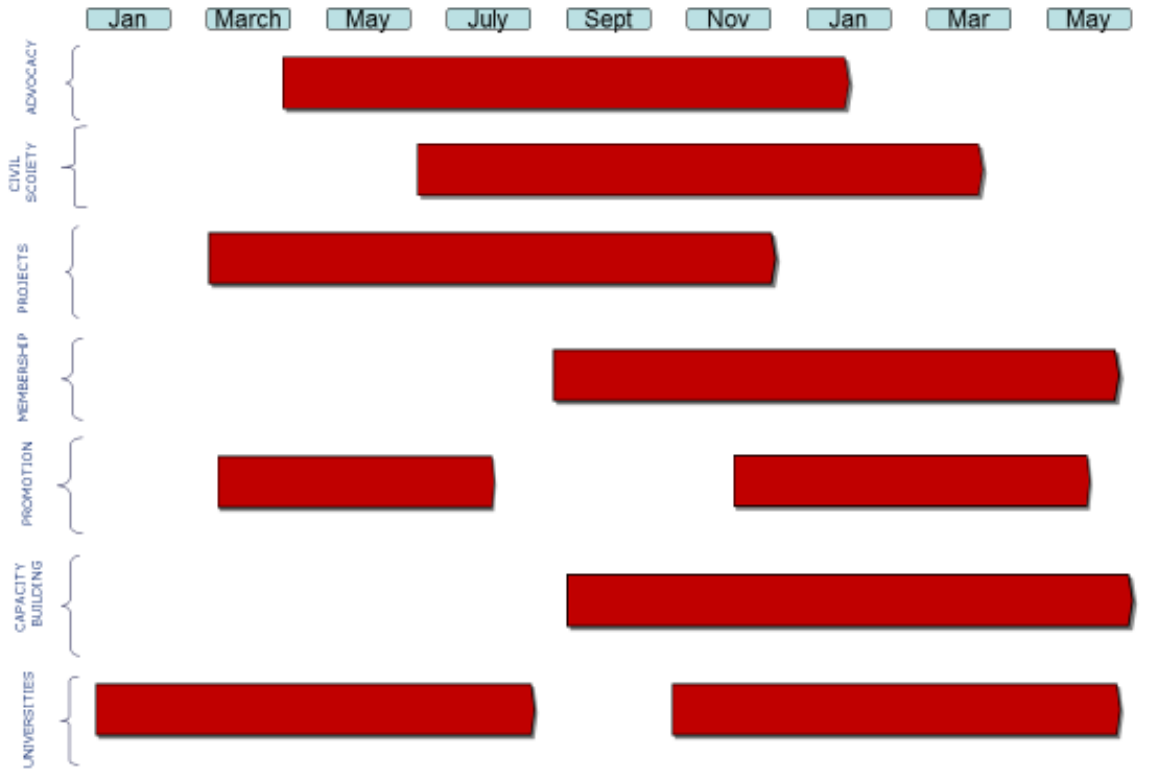
Alongside these workstreams are 5 areas of ongoing focus:

1. Stakeholder management with particular objectives: that government cares about heritage; that civil society's voices are heard and strengthened; that the public is encouraged to value heritage; monitoring specific threats to heritage that can create positive PR and exploration of non-government funding.
2. A regular media focus on positive stories about culture and built heritage.
3. Building international links especially with INTO Africa group. Although there are many things to learn from the wider INTO community, the specific challenges in sub-Saharan Africa seem best explored in depth through this group.
4. Fundraising is difficult, but it is obvious that the domestic tourism market is small and the natural heritage sites will attract funding more easily. But with dedicated time, and with the help of both INTO and domestic organisations such as the Uganda Biodiversity Trust Fund, other avenues can be explored.
5. Scoping links to climate change and "green space" - as mentioned earlier this seems a fruitful area to explore.

A final area of activity is scoping the role of technical advice provision for owners of historic buildings. This is not an area I have experience of, and in the UK, it is provided by a number of bodies both within government and in civil society. This is worth further discussion with INTO.

5.6 Timescales and Activity Matrix

The model below can be used to plan the activities - note the bands are specific workstreams and then ongoing activity is shown along the bottom of the table. This could be linked to a responsibilities' matrix across the CCFU staff team.



Ongoing Activities: stakeholder management; media; international links; fundraising; climate change

Conclusion

In one sentence, my conclusion is that CCFU is already a National Trust in all but name! The opportunity for CCFU is not to create a separate organisation but to manage the internal structure of the organisation to both be able to continue its current excellent projects and develop expertise in built heritage. The advocacy and education work that CCFU already does has a huge impact on heritage and culture in Uganda, a complementary focus on property ownership and a small scale membership offer can only enhance the reach of the organisation as a whole.

In terms of the wider picture for INTO, this also strongly suggests that there isn't a 'one size fits' all model of a National Trust.

Many thanks to INTO for funding the travel element of my sabbatical; to the England, Wales, Northern Ireland Trust for the very generous paid three month sabbatical, but most especially to the whole brilliant CCFU team – I rather feel that, ultimately, I learnt more from them than they learnt from me!

Justin Scully April 2020

Further Reading:

There has been surprisingly little written about Heritage Trusts, particularly academic studies. An obvious source of information are the websites and annual reports of individual Trusts themselves (both within and outside the International National Trusts Organisation). Other sources I have found useful are listed below:

Resources from INTO

The most useful document is the INTO Handbook and there are two very relevant blogs from Catherine Leonard (INTO Secretary General) as well as her study on the National Trust for Trinidad and Tobago. June Taboroff's study on Hong Kong was very influential on my report, as was the Kosovo report.

From Start up to Sustainability – An INTO Handbook for Heritage Trusts

<https://intoorg.org/wp-content/uploads/2017/09/INTO-Handbook-LATEST-VERSION.pdf>

Catherine Leonard's Blog Posts: *What is a 'model' National Trust?* <https://intoorg.org/38017> and *10 things to think about when setting up a National Trust* <https://intoorg.org/20351>

Also her Study on the National Trust of Trinidad and Tobago <https://intoorg.org/wp-content/uploads/2016/09/Report-on-the-National-Trust-of-Trinidad-and-Tobago-June-2013-v-2016.pdf>

June Taboroff's Study on the *Feasibility, Framework and Implementation Plan for Setting up a Statutory Heritage Trust in Hong Kong* http://www.devb.gov.hk/filemanager/en/content_31/engfullrep.pdf

The Development of a National Heritage Organisation for Kosovo – Rachel Nordström

<https://intoorg.org/wp-content/uploads/2015/11/Membership-Organisation-for-Kosovo-and-CHWB-2.pdf>

Publications specifically relevant to the UK:

Both the England, Wales, Northern Ireland Trust and National Trust for Scotland tend to focus their publications on the properties they own rather than themselves as institutions. The books listed below are available (all second hand) online. Most of the books are anchored around the 100 year anniversary of the E, W, NI Trust and the 70th anniversary of NTS, although Robin Fedden's book is a fascinating insight into the Trust 'pre modernisation'. All are to a degree hagiographical except for Weideger.

The Continuing Purpose (1968) Robin Fedden

Figures in a Landscape: History of the National Trust (1988) John Gaze and Len Clark

Gilding the Acorn: Behind the Facade of the National Trust (1994) Paula Weideger

From Acorn to Oak Tree: The Growth of The National Trust 1895-1994 (1994) Jennifer Jenkins

The National Trust: The Next Hundred Years (1995) Howard Newby

The National Trust: The First 100 Years (1997) Merlin Waterson

Founders of the National Trust (1999) Graham Murphy

There are also published biographies of two of the Trust's founders Octavia Hill and Sir Robert Hunter.

For the Benefit of the Nation (2001) Douglas Bremner (history of National Trust for Scotland)

Although not strictly about the history of the Trust, *Some Country Houses and their Owners* by James Lees-Milne (1975) is a fascinating and witty account of the period when many English Country Houses came to be owned by the Trust. James Lees-Milne was a very noted diarist and worked for the Trust from 1936 to 1973.

Alongside the history of the Trust, the history of the Society for the Protection of Ancient Buildings is very useful context (<https://www.spab.org.uk/about-us/spab-history>) as well as *The Men from the Ministry* noted below which is a history of the Office of Works / English Heritage.

Related publications on Heritage Consciousness

The role of heritage in society and how it comes to be valued is a subject more studied than Heritage Trusts themselves. These publications have been the most useful in understanding the context of Trusts, largely in the developed world:

The Uses of Heritage (2006) Laura Jane Smith

The Heritage Obsession: The Battle for England's Past (2008) Ben Cowell

Economics and Culture (2008) David Throsby

The Men from the Ministry (2013) Simon Thurley

The Past Is a Foreign Country (1985 & Revised 2015) David Lowenthal

The Fight for Beauty: Our Path to a Better Future (2016) Fiona Reynolds