

Capacity Building for the National Trust Ideal



Executive Summary

Catherine Leonard, INTO Secretary-General

2019 was a remarkable year for INTO. The Helen Hamlyn Trust funding, which led to the appointment of Alexander Lamont Bishop in March, has revolutionised INTO. We had a really strong first ten months of the 'Capacity Building for the National Trust Ideal' project. Sadly, some of our planned activity for February and March this year has had to be postponed as we adapt to the new reality of coronavirus. However, we are still on track with all of our objectives and exceeding many as the Trustees will read in the following report. We have also been in touch with the Helen Hamlyn Trust with some suggestions as to how we might take approach the next phase of the project, and we welcome your advice and input into our thinking.

The key successes over this reporting period (ending March 2020) have been the launch of our new Technical Assistance Programme (TAP-INTO), membership recruitment and raising the profile of INTO through a new communications plan. All of which support our overall aims to expand INTO's ability to catalyse and grow the international family of National Trusts and to develop and promote our global messages more visibly.

Like many organisations, the Covid-19 pandemic has of course had an impact on our work. We had to postpone our INTO Asia regional event in Singapore with the V&A in February, our flagship Incubator programme in March, and delivery of the new INTO website. This has led to an underspend on our first year's funding from the Helen Hamlyn Trust. We are however busier than ever, supporting our INTO members through a difficult and worrying time. The virus seems to strike at the heart of what we particularly value at INTO: coming together, networking and community. And yet we know from experience that things are better when we work together as a global community. A colleague from the Gelderland Trust in the Netherlands wrote: "We have to thank you for the way you connect the world during this crazy period! It is comforting and inspiring to hear about the experiences of other National Trusts."

The INTO Trustees have supported our agile approach and enabled a slight pivot in focus, as we continue to face the challenge of Covid-19. Whilst we will continue to grow the numbers of INTO members, we have a duty to focus this coming year on our existing membership. We need INTO members to transition through the current crisis so that they can continue delivering for natural and cultural heritage. But we want them to grow and prosper in the 'new normal' too. There is more detail for Trustees in the Covid-19 impact report attached to this document.

The INTO Trustees would like to express their thanks for the commitment, flexibility and responsiveness that have characterised our relationship with the Helen Hamlyn Trust as we work our way through this unprecedented situation.

Grant Aims

Summarised

The HHT grant supports two key areas of work:

1. Sharing learning

A technical assistance programme (TAP-INTO) work that supports our members and attracts prospective members, led by the new role of Deputy Director.

2. Raising INTO's profile

Communication of a refined global message for INTO, raising our profile to a wider audience and attracting new members.



INTO Trustees and staff

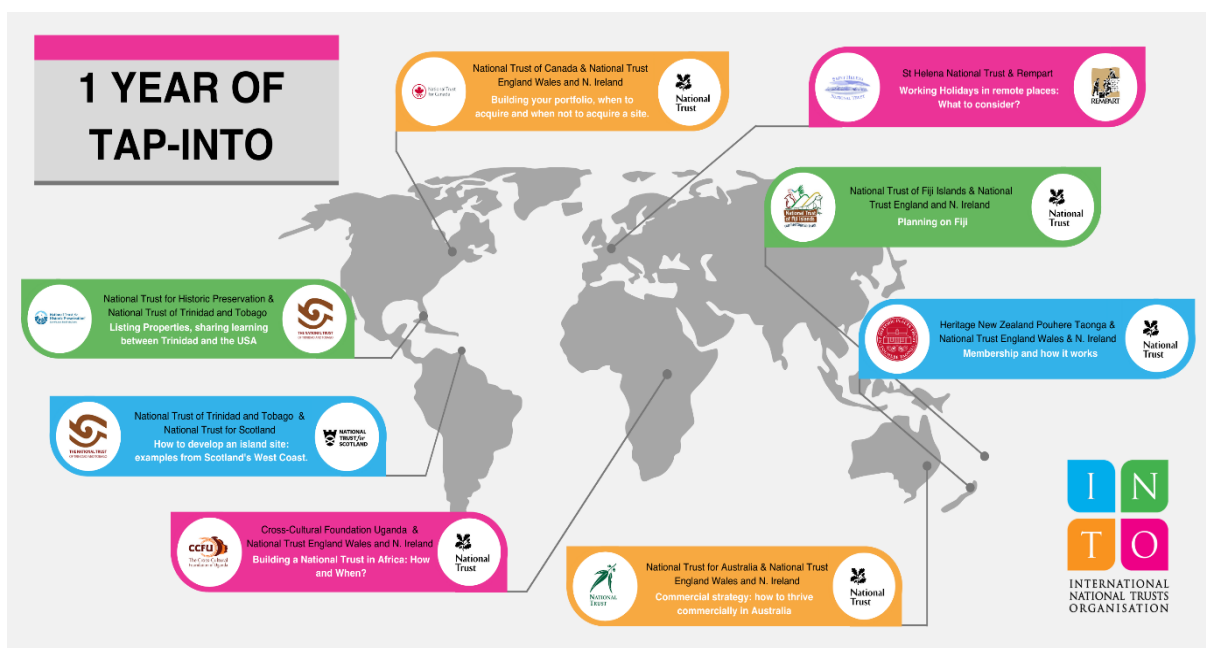
Activities

Sharing learning – TAP-INTO

Our TAP-INTO programme supports opportunities for INTO members to collaborate, accessing expertise overseas. In our interim report, we set ourselves a target of 10 successful projects in its first year. We are pleased to report that we supported twelve.

Eight of these grants were for bilateral projects between trusts, and four were tickets for African trusts to attend the INTO Africa meeting in Nairobi. The applications process is open, but the majority of successful projects are curated by INTO – we support trusts in need of assistance to find the expert that they need.

Please see the graphic below for a representation of the collaborations supported by INTO under the TAP-INTO banner.



A key component of the programme's success is the creation of some incredibly useful tools for INTO members to use, with application beyond their first partners. Please see here for an example of these documents – [Justin Scully's feasibility study for a Ugandan National Trust](#).

Focusing on the hard costs of international travel with cost sharing built in, the programme delivers fantastic value for money, costing just over £18,000 in its first year.

The collaboration was fantastic and the feedback from the other state National Trusts in Australia was incredibly positive.

Debbie Mills, Director, NT New South Wales

The TAP-INTO programme has allowed us to improve how we manage, conserve, and think about our main site, Nelson Island. I wholeheartedly endorse the use of this programme to other National Trusts who are looking to develop their own capabilities.

Kara Roopsingh, Senior Preservation and Research Office, NT Trinidad and Tobago

Sharing learning - ASK-INTO

ASK-INTO is the opportunity that we give all of our members to connect them to one another. We receive consistent feedback that this is the most important support that we provide to members, but it remains the hardest to quantify.

Coalesced into a programme under the management of our new Deputy Director, we supported 79 of these requests in this reporting year, almost quadrupling our target of 20. Connecting people in response to member requests comes back to the essence of running a network and the content of these requests remains incredibly diverse.

ASK-INTO requests ranged from sourcing information on inalienability in English and Welsh law for the NT Bermuda, to an introduction for a National Trust for Scotland curator to the Sri Lankan NT, in order to collaborate via phone and email on the colonial elements of the work of the Scottish artist E A Hornel and investigate possibilities for it to travel to Colombo.



E A Hornel CC : [Source](#)

[9 & 10 GEO.5] *National Trust Charity* [Ch.lxxxiv.]
Scheme Confirmation Act, 1919

SCHEDULE

SCHEME FOR THE APPLICATION OR MANAGEMENT OF THE CHARITY CALLED THE NATIONAL TRUST FOR PLACES OF HISTORIC INTEREST OR NATURAL BEAUTY INCORPORATED BY THE NATIONAL TRUST ACT 1907 (7 EDW.VII. CAP CXXXVI. LOCAL AND PRIVATE).

1. Notwithstanding the enactment contained in section 21 of the above-mentioned National Trust Act 1907 that the following properties shall be ~~inalienable~~

- (A) the properties specified in the First Part of the First Schedule to the said Act so far as the same are vested in the above-mentioned National Trust for Places of Historic Interest or Natural Beauty (hereinafter called "the Trust"); and
- (B) any properties which after the passing of the said Act have already become or which may hereafter become vested in the Trust and in respect of which such a resolution as is referred to in sub-section(2) of the said section has been or may be passed;

and notwithstanding any other provision of the said Act it shall be lawful for the Trust to grant leases of those properties or of any of them or of any parts or part thereof for such terms of years at such rents and with and subject to such provisions reservations covenants and conditions as the Board of Trustees of the Trust from time to time think proper provided that a lease under the provisions of this clause shall not be valid or effectual unless the Charity Commissioners being satisfied that the same may with due regard to the purposes of the Trust property be granted shall by their order have sanctioned the grant thereof.

Inalienability in the National Trust Act

The ASK-INTO programme is designed to lead to TAP-INTO grant requests, in order to foster and grow collaborations between members. Several TAP-INTO projects outlined above began as such requests, including those from St Helena and Trinidad.

Sharing Learning - Regional Meetings

In this reporting period, we launched a new programme of INTO regional meetings, with an ambition to have four meetings during 2020: Africa, Asia, Europe and Americas. We see these events as critical to driving membership growth and promoting INTO's message on a global scale. They will be delivered on a biennial basis, to retain the primacy of our main conference.

We have chosen to deliver these conferences in partnership with other events, ensuring a wide audience for our messaging and extended networking opportunities for our members.

The new role of Deputy Director provides the much-needed capacity to work with regional groups to get this programming off the ground, as well as the personal contacts needed to work in partnership, from the Victoria & Albert Museum in London to the British Council in Kenya.

All four meetings have been planned, although three have been affected by the COVID-19 outbreak.

Meeting	Partner event	Status
INTO Africa Nairobi	Culture Grows in Africa conference (British Council Africa)	Complete, February 2020
INTO Asia Singapore	Colonial Heritage conference (V&A museum, Singapore Management University)	Postponed, originally planned early March 2020
INTO Europe Cirencester	INTO Incubator (National Trust)	Postponed, originally planned early April 2020
INTO Americas Miami	PastForward conference, Miami (National Trust for Historic Preservation)	Planned for October 2020, likely a digital event

The INTO Africa meeting was a huge success for INTO, leading to a new relationship with potential INTO members in Nigeria, Ethiopia, Kenya, South Africa and the Seychelles, as well as building a closer relationship with ICCROM.

The partnership model was also fruitful, with opportunities for our members to speak to audiences of more than a hundred African and British heritage sector leaders. Our new Deputy Director spoke on the benefits of the National Trust model to this audience.

After the British Council collaboration, he spent two days closely supporting African INTO members to consider the benefits of the National Trust model and how these might best be adapted for work on the continent, including development of a combined programme of educational work based on the successful Ugandan example.



INTO Africa conference in Nairobi

Sharing learning – The INTO Incubator

In March 2020, the INTO incubator was due to bring international heritage organisations to the UK in order to inspire them with the National Trust model. The one-week residential programme in Cirencester, postponed to September 2020, will take place at the Royal Agricultural University.

The programme will bring together 20 heritage NGOs, all new to INTO, that are interested in the National Trust model. These representatives are all senior managers from organisations across the globe, from Egypt to Jamaica, Singapore to Sark. They will spend two days visiting National Trust sites in the Cotswolds, in order to see where they might be in 125 years' time.

Thereafter, a group of established INTO members from around Europe will arrive, bringing with them the institutional memory of establishing new National Trusts. Our Deputy Director will facilitate two days of intense workshopping with this group, mapping a plan for these organisations to join the INTO movement.

INTO will gain fifteen new members thanks to the programme, many of whom have already signed up in advance of coming. We also aim to raise our profile in the UK, bringing together the sector to learn about the work that we are doing. [See the full programme here.](#)



The Incubator venue in Cirencester

The Incubator programme was due to begin on the 29th of March, making it poorly timed for COVID-19 outbreak and resulting in some underspend in this reporting period. Fortunately, most of the investment already incurred in the programme could be moved to a later date, and we are looking forward to delivery in September.

Raising INTO's profile: Communications policy update

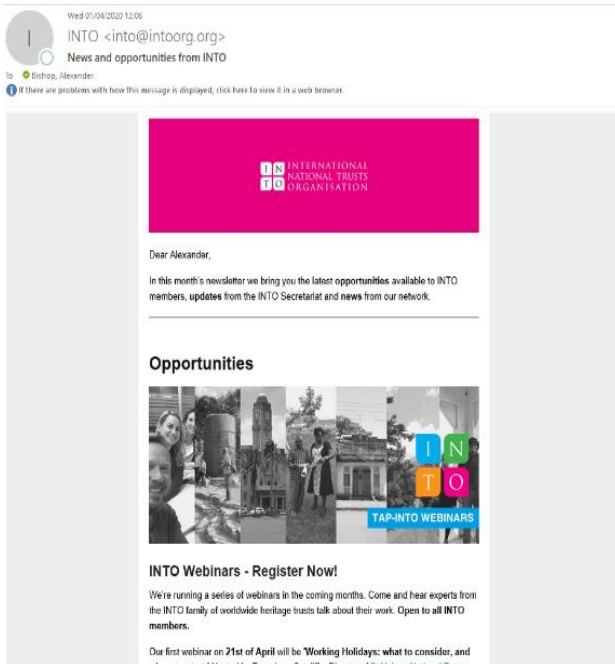
In year one in post, the new Deputy Director has taken responsibility for communications at INTO. A comprehensive new communications plan has been written, completely overhauling the previous procedure and creating an organisational strategy.

The key outputs from this report include:

- Identification of INTO's core audiences (members) and prioritisation of others
- Closure of legacy social media channels
- Proposal for the development of a new website
- Standardisation of social media presence across platforms
- Launch of new Instagram account (@intoheritage)
- Redesign and reimagining of newsletter as key place for member updates
- Purchase of new, simplified URL: into.org (to be launched with new website)
- Creation of a new corporate style and simple but consistently used brand guidelines

As the new communications policy has been implemented, we have seen a marked improvement in engagement with INTO channels. The new newsletter is regularly reaching more than 500 readers, with an impressive average open and click rate (32% / 9%). Significant growth has occurred across social media and INTO has successfully engaged with members for campaigns, of which more below.

Most importantly, our online presence is increasingly professional, which has been supported by our recruitment in November of a new Communications Assistant, reporting to the Deputy Director. This new role is funded by another project.



The revamped newsletter and communications plan



Communications: New website

A key recommendation in the Communications Plan is to secure an entirely new website for INTO. At the close of the reporting period, significant funding had been secured from the National Trust to develop this for INTO. Design work was complete and development work well underway. A delivery date in June 2020 was anticipated.

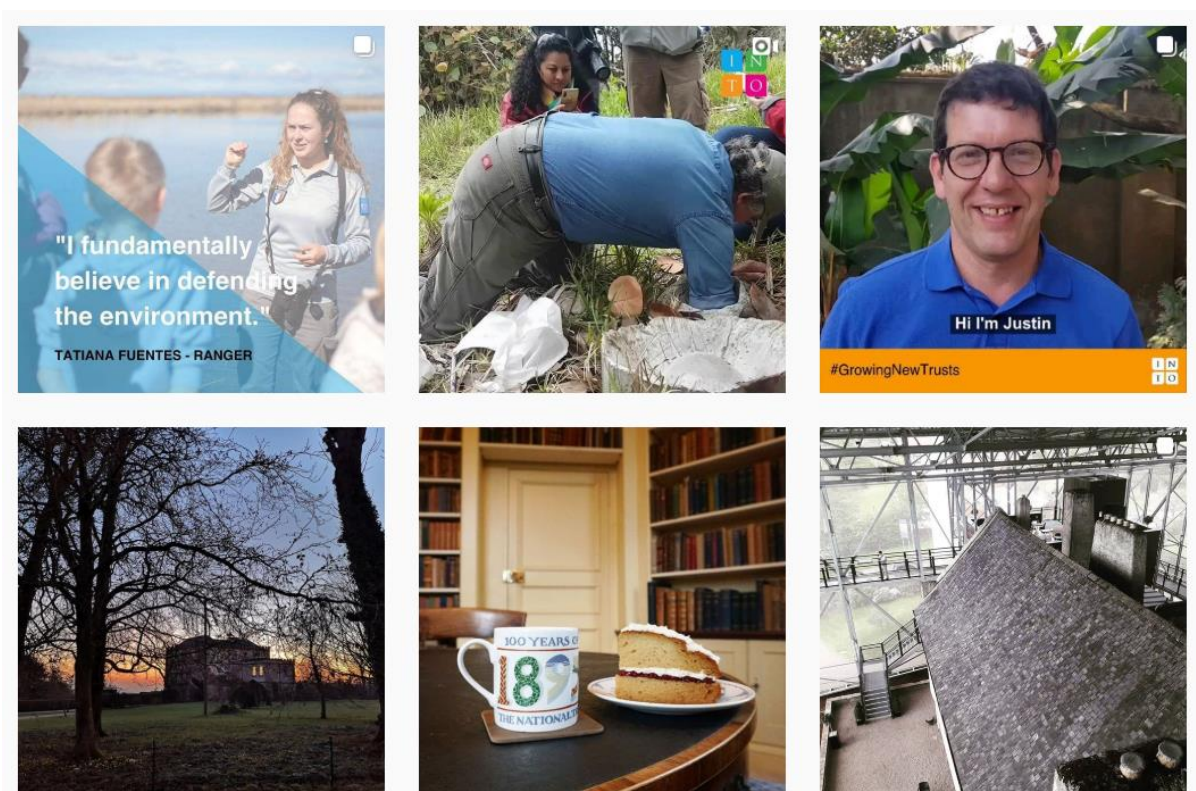
Unfortunately, COVID-19 has caused all project work to be paused by the NT. We are currently investigating the possibility of a temporary online environment that we can use until this can be resumed.

Communications: Campaigns

Spurred on by the new corporate style outlined in the Communications Plan, INTO has begun to produce content structured around campaigns. The most prominent of these in 2020 is entitled 'Growing New Trusts', due to culminate in the Incubator programme. There are also shorter-term campaigns tied to specific days, for instance [our work on virtual visits for World Heritage Day](#).

These campaigns act as an anchor point for all INTO communications content within a given period, from speeches delivered by the leadership to Instagram posts. In discussions with members, it is clear that they have also contributed to a significantly elevated profile for INTO within the sector, as we come increasingly to be thought of as a place where the sector can come for insights.

We increasingly see online publications centred on a theme as the best way to engage with our membership and maximise our voice in the international arena.



A selection of content from our new Instagram account

Communications: Arms Wide Open from Bermuda

In March 2019, we had the INTO Bermuda international conference, which brought together representatives from INTO members around the globe. Although not funded by the HHT, grant, the conference and its aftermath are a major part of INTO's work in the last year.

The conference included:

- Four days of conference programming
- Keynote addresses from leading voices in the heritage sector, including Princess Dana Firas of Jordan and Gus Casely-Hayford, Director of the Smithsonian National Museum of African Art
- Excellent networking opportunities with more than 120 representatives of forty countries and territories
- 5 excellence awards presented to National Trusts delivering exceptional work globally
- INTO reception hosted at the Governor's residence

The conference theme centred on the notion of 'Arms Wide Open', or how National Trusts can open their arms to as wide an audience as possible. This resulted in our Arms Wide Open report, collecting case studies presented in Bermuda, [available in full here](#). The report was written by our Deputy Director with forewords from Queen Quet of the Gullah/Geechee Nation and Alanna Anderson, President of the Bermuda National Trust.



INTO Bermuda conference: Arms Wide Open

Communications: Raising INTO's international profile

The Deputy Secretary-General has attended and spoken at events in Denver, Nairobi and Edinburgh. Indirectly supported by the HHT grant, INTO has also been able to leverage opportunities to put our message across in various venues across the world.

INTO is increasingly looking to take interface with other networks in order to make its voice heard, as discussed under regional meetings above. As well as these regional events, we have recently taken an active role in a number of international networks, becoming a member of IUCN and the Climate Heritage Network, as well as reporting to the Grantmakers for Cultural Heritage Preservation network on the impact of COVID-19 for the heritage sector.



Celebrating the 5th anniversary of the Czech National Trust with Prince William Lobkowitz in Prague

Outcomes

In our application to the Helen Hamlyn Trust, we identified 6 KPIS. In spite of coronavirus disruption, we remain on track for delivery of them all.

KPI	Progress to date	Status	Comments
10 successful TAP-INTO interventions in 2019-2020	We completed 12 interventions over the reporting period	Complete	We're very happy with our progress on TAP-INTO, and busy planning for a revised programme, deliverable in the context of COVID-19.
4 Candidate members properly established with fantastic processes, resources, governance by 2021	We have signed on 3 new candidate members, and begun work on growing candidates into full Trusts, starting with Georgia and Haiti.	On track	Some planned activity for this year has been postponed due to coronavirus (planning visit to Haiti). The postponement of the incubator has had a somewhat negative impact, but this is manageable.
3 new National Trusts founded by 2021	We are working with partners in Nigeria, Uganda and Slovenia on the creation of new National Trusts.	On track	We hoped to identify further potential new trusts at our incubator, so progress has also been impacted here. (Likely were Egypt, Sark, Sweden or Poland)
100 INTO members by 2021	On track - we acquired eight new trusts as members in this year, taking us to a total of 84. There will be some membership churn as we update to a new system with the new website, so we hope to keep recruitment high in 2020.	On track	We are hoping to foreground a target of 60 full members, including new full members and associate or candidate members that move up a category. This will increase financial stability for INTO and ensure that we give our attention where it is most relevant.
2 new reports/documents per year with associated multi-level communications strategies	We have completed the Arms Wide Open Report and our Growing New Trusts Campaign, which was been at the heart of our work in the last three months of the reporting period.	On track	The Growing New Trusts campaign has produced lots of exceptional material that is of great benefit to members, and is the model that we believe has greater impact for INTO. It should have culminated in a video report of the INTO incubator which has been postponed.
2 new ambassadors recruited in 2019-20	In this reporting period, INTO was delighted that three Ambassadors accepted our invitation to become associated with the organisation: Lady Helen Hamlyn CBE; His Highness, Gaj Singh the Maharaja of Jodhpur; Hashim Djojohadikusumo, the Indonesian entrepreneur.	Complete	We were delighted to be able to host an INTO Ambassadors' dinner in 2019 in London, attended by Lady Hamlyn and Hashim Djojohadikusumo, as well as Dame Fiona Reynolds, Dr Tristram Hunt, and Sir Laurie Magnus.

Learning & planning

The short-term future of INTO will be shaped by the impact of the COVID-19 pandemic, which has deeply affected our operations and those of our members. In response, we are adapting our work to suit the new operating environment, and the planning below reflects this. In order to outline this process, we have first summarised the impact of the pandemic.

COVID-19 impact

Impact on INTO

- We have underspent in this year by £15,513, due to the postponement of activity that was due to take place in the first part of 2020.
- Postponement of the incubator and regional meetings has impacted on our growth with new trusts, as well as opportunities to make our voice heard on the international stage.
- Key support staff have been furloughed by the National Trust, reducing our capacity.
- The pandemic has caused the postponement of funding for our website project and reduced our capacity to represent INTO at international venues
- None of our members is working with 'business as usual' and they are all consequently much more actively looking to learn from international case studies. The nature of the work has changed somewhat, but we are actually busier than ever.

Impact on our members

- There has been a change in priorities. Members are more interested in practice from overseas, but there is less capacity to engage with international programmes.
- There is the real possibility that some members will collapse under financial pressures caused by the impact of the coronavirus, in particular in places where there is significant exposure to the tourism industry.
- We are forecasting the possibility of reduced revenue for INTO next year (2021) as members may be either unable to afford their (full) membership fee, or drop into a lower payment bracket due to reduced turnover.

Proposal

- We aim to address underspend by developing new financial resources that members can access. In the short term, this may include spend that will keep organisations above water, in particular new costs incurred due to the virus.
- Where possible, we will look to deliver events in digital environments, and will develop new virtual programmes of benefit to our members.
- We will remain open to new members, but accept that the operating environment over the next twelve months will be more challenging for recruitment.
- INTO will invest in our online presence, in order to deliver digital work more effectively. This will include a stopgap measure for the new website project.

As a result of the above, our planning for the 2020/21 reporting period includes some significant revisions from that proposed in our last report.

Planning for 2020/21

Sharing learning

- 80 requests facilitated through ASK-INTO, with increased support for follow up activity in the digital space
- Two rounds of TAP-INTO funding delivered, with a broader focus that allows member trusts to address the impact of the COVID-19 pandemic.
- Develop and deliver a new INTO Webinars programme for members (pictured), using completed TAP-INTO projects as inspiration for the first sessions.
- 1 postponed INTO Incubator delivered, with a target of 5 trusts with increased capacity, among them at least 2 organisations with the aspiration to become national trusts. If this is not possible due to COVID-19, development of an alternative digital offer.
- Host as many regional events as possible, preferably in person, but otherwise digitally. The Miami conference will take place online in October, and we have lined up 9 speakers from National Trusts globally.
- Work with young and nascent trusts on their establishment. In 2020, we plan in particular to support Slovenia and Nigeria.
- Focus on working holidays offer as an opportunity for members, COVID-19 permitting.



Raising INTO's profile

- Continue to work on delivery of a sector-defining conference in Antwerp in 2021 (scheduled to take place just into the next reporting period).
- Launch at least two campaigns that bring together INTO members and achieve a broad reach in the sector, building on the successful virtual visits work.
- Implementation of a temporary website solution, until resumption of NT projects.
- Funding for one follow-up grant secured, increasing INTO's profile and furthering its financial sustainability (Several bids have been submitted or are in development.)
- Further engagement with INGOs, in particular the Climate Heritage Network, in reflection member feedback of the importance of climate change.
- One trustee's meeting in person. We hope that this will take place in India in September, at the gracious invitation of His Highness, Gaj Singh the Maharaja of Jodhpur.

BENEFICIARIES

[2019/20]

The Helen Hamlyn Trust grant has enabled a new, deeper level of engagement with the National Trusts that we support.



12 career-defining TAP-INTO Projects

with trusts from **18** countries

CAPACITY BUILDING FOR NATIONAL TRUSTS



31

weeks of knowledge sharing



79

expertise matching requests



396

new followers on social media channels



1800

views of our new look newsletter



20

heritage trusts signed up for the Incubator

Press and PR

Chronologically below are a series of press that INTO activity attracted in this reporting period.

Bermuda conference, [UNESCO](#), and in the Bermudan press, [one](#), [two](#), [three](#).

General press: [Martin's Plaut](#), [Prague event](#),

Sector specific: [NT magazine \(Britain's most read magazine\)](#), [The Heritage Alliance](#), [the Hay Festival](#)

We are proud of developments in our social media channels, and we invite you to take a look at our Instagram, Facebook and Twitter profiles here:



Acknowledgement of the Helen Hamlyn Trust

The HHT's generous support is acknowledged on all materials produced for the programmes that it supports, as well as in our Annual Report and on our website.

See examples here:

- [TAP-INTO programme](#)
- [ASK-INTO programme](#)
- [Arms Wide Open Report \(last page\)](#)
- [Incubator programme](#)
- [Annual Report](#)

Finance

Expenditure	Break down	Spend	Notes
Deputy Director Salary			Increase due to automatic NT pay rise at end of Y1 (March 2019). No pay rise into next year due to COVID-19
	Salary costs (including on costs)	£51,436	
<i>Profiled</i>	£50,400	<i>Difference: £1,036 (overspent)</i>	
<p>Comments</p> <ul style="list-style-type: none"> • Increase due to automatic NT pay rise at end of Y1 (March 2019) • No pay rise next year due to COVID-19, so this will correct 			
Travel (Advisory visits, conferences, domestic travel etc.)			£15,000 profiled in grant application:
	International conference costs	£4,584	Denver, Nairobi, Prague, France
	Domestic Travel	£526	Scotland, various UK events
	Subtotal	£5,109	
<i>Total profiled</i>	£15,000	<i>Difference: £9,891 (underspend)</i>	
<p>Comments</p> <ul style="list-style-type: none"> • Underspend due to postponement of travel to Singapore. • In order to maximise the money available for members, we met these costs wherever possible from other budgets, intending to use underspend against this budget heading to finance more of the incubator. 			

Technical Assistance programme (TAP-INTO)			
	Travel Grants (grants via open call)	£6,771	
	Travel Grants (INTO Africa bursaries)	£3,710	
	Travel Grants (incubator)	£5,071	
	INTO Africa	£1,170.42	Costs in Nairobi
	Incubator	£1,898	Committed costs, mostly postponed.
	Subtotal	£18,342	
<i>Total profiled</i>	<i>£25,000</i>	<i>Difference: £6,658 (underspend)</i>	
Comments <ul style="list-style-type: none"> Underspend due to postponement of incubator and INTO Asia meeting 			
Total Spent	£74,887		
Total Underspend	£15,513		

Signature

Signed: CATHERINE LEONARD

Date: 22 MAY 2020

Signature: 