



EXECUTIVE SUMMARY

Portfolio Review, Built Estate Analysis,
and related Insights reports



**NATIONAL
TRUST *for*
SCOTLAND**

The National Trust for Scotland is a Scottish Charity, SC007410

THE PORTFOLIO REVIEW

BEFS were commissioned to work with the Trust, providing additional resource on the journey of reviewing the portfolio.

The work supports understanding of the properties as a primary source of implementing Trust purpose; through measuring that implementation, transparently reflecting a broader range of values in relation to the portfolio, as well as supporting development of future policies in relation to acquisition. This process is underpinned by the Trust's ten-year strategy *Nature, Beauty and Heritage for Everyone*¹, and supports the NTS to be more resilient and relevant for the future.

The Portfolio Review harnesses existing (and developing) data. A comprehensive review of the functional data sets held was carried out, and a considered view as to how those data sets can add to our discussions on value inform this process was made. Then wider sector ownership and management are considered, this gives context for current and future Trust ownership and influence. It also highlights the potential for individual assets, and sites, to demonstrate key organisational values - suggesting the opportunities they represent to enhance delivery of the Trust's purpose and strategy. In turn, this work can shape and inform priorities for acquisition, and provide options to support the Portfolio's representativeness for the future.

The Trust's heritage portfolio, and the connected intangible heritage, is unique within Scotland in the number of visited sites and their combination of natural, built, and moveable assets. A values-based assessment framework helps to demonstrate that the natural/built divide is both permeable in the benefits brought – and often of more value when considered collectively. The *whole* telling a richer story, than the sum of the parts.



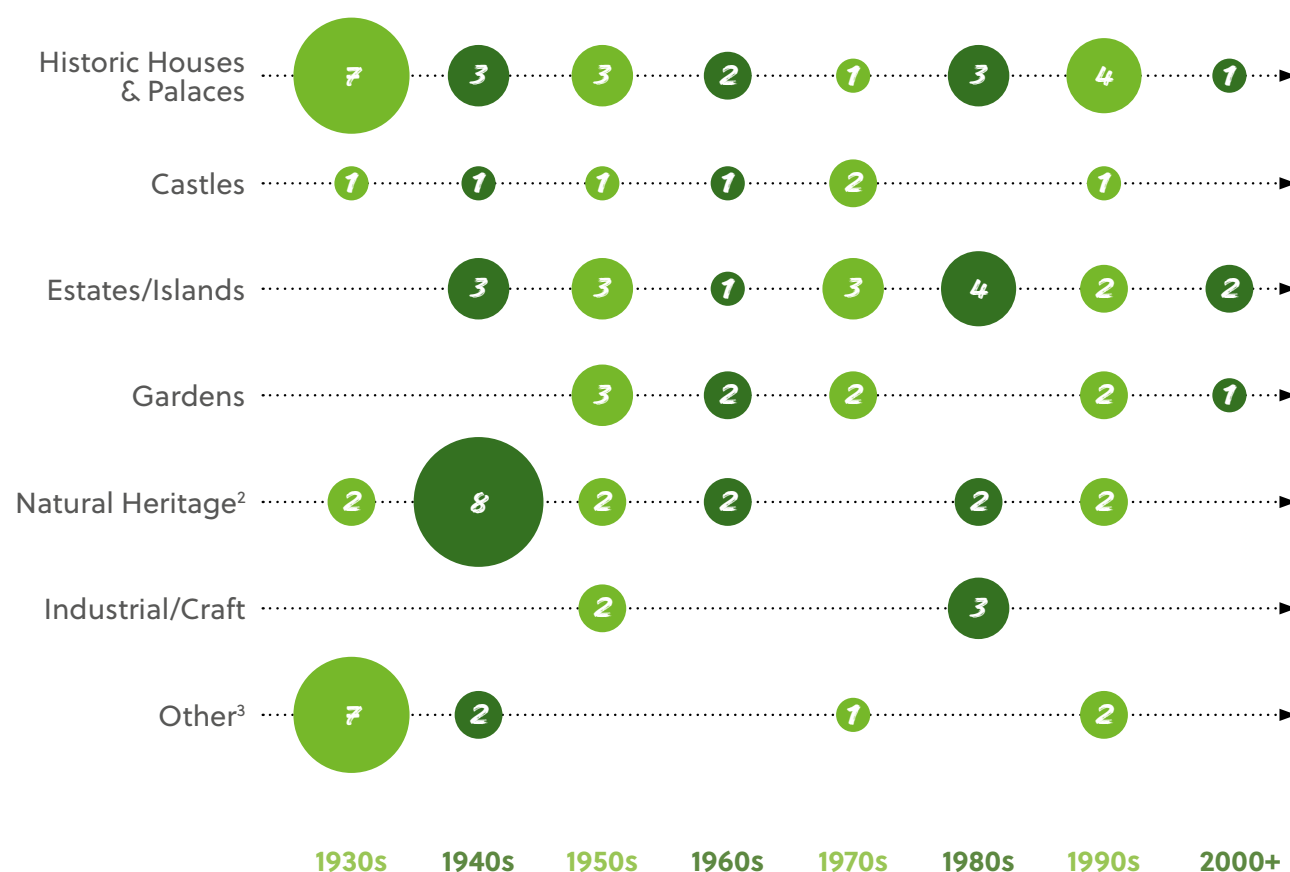
¹ Our strategy | National Trust for Scotland (nts.org.uk)



This review process considers how ownership, management, conservation agreements, and partnership (in relationship to the properties) can help to deliver the objectives set within the new Trust strategy. We actively examine net-zero contribution from assets (alive to the potential for embodied

carbon to be more clearly articulated in coming years); explore potential in seeking to engage more people (visitors and Members) through encouraging not only advocacy strands, development of partnership models, but also new types of sites being considered for portfolio acquisition.

Acquisition Dates for the Visited Properties in the Current Portfolio (2022)¹



¹ Dates reflect the first acquisition of land at sites. In later years, additional land may have been acquired at sites. This graphic does not include any of the Guardianship Properties, Macquarie Mausoleum (managed on behalf of the National Trust for Australia) or Pollok House (rented by the Trust from Glasgow City Council). Information has been sourced primarily by cross-referencing the Built Estate Asset and Classification Register with the internal Trust document, 'Chronology of NTS Properties' documenting acquisition information up to 2005.

² Within these categories, Natural Heritage Properties are those in which the focus of the property is deemed to be on natural, rather than built, heritage. Estates and Islands have been classified separately as they commonly include both a natural and built heritage focus.

³ This category includes memorials, battlefields and religious sites.

The Trust is centred around people, from Members to the Trust's own staff team, and volunteers; and what the Trust care for is the evidence and understanding of our collective interaction with land and places. Past acquisitions have often been circumstantial, opportunistic, or led by individuals of influence. This process aims to ensure that the questions that cannot be answered for the past - will be able to be answered for the future. Ensuring the Trust has a dynamic portfolio, reflecting the variety of Scotland's past, resonating with Scotland's present – and fit to conserve, and be part of, Scotland's stories for a sustainable future.

To fulfil this BEFS have delivered both Reports, and Insights pieces for staff use, expanding on some of the areas covered by the detailed Portfolio Review and Built Estate Analysis reports:

- **PORTFOLIO REVIEW:**
Insights, Values & Evaluation – Report
- **BUILT ESTATE ANALYSIS:**
Report
- **INSIGHTS:**
Examining Trust portfolio Data
- **INSIGHTS:**
Values Framework, applicability, and operational potential – including Toolkits
- **INSIGHTS:**
Built Estate Analysis & Framework applicability and learnings

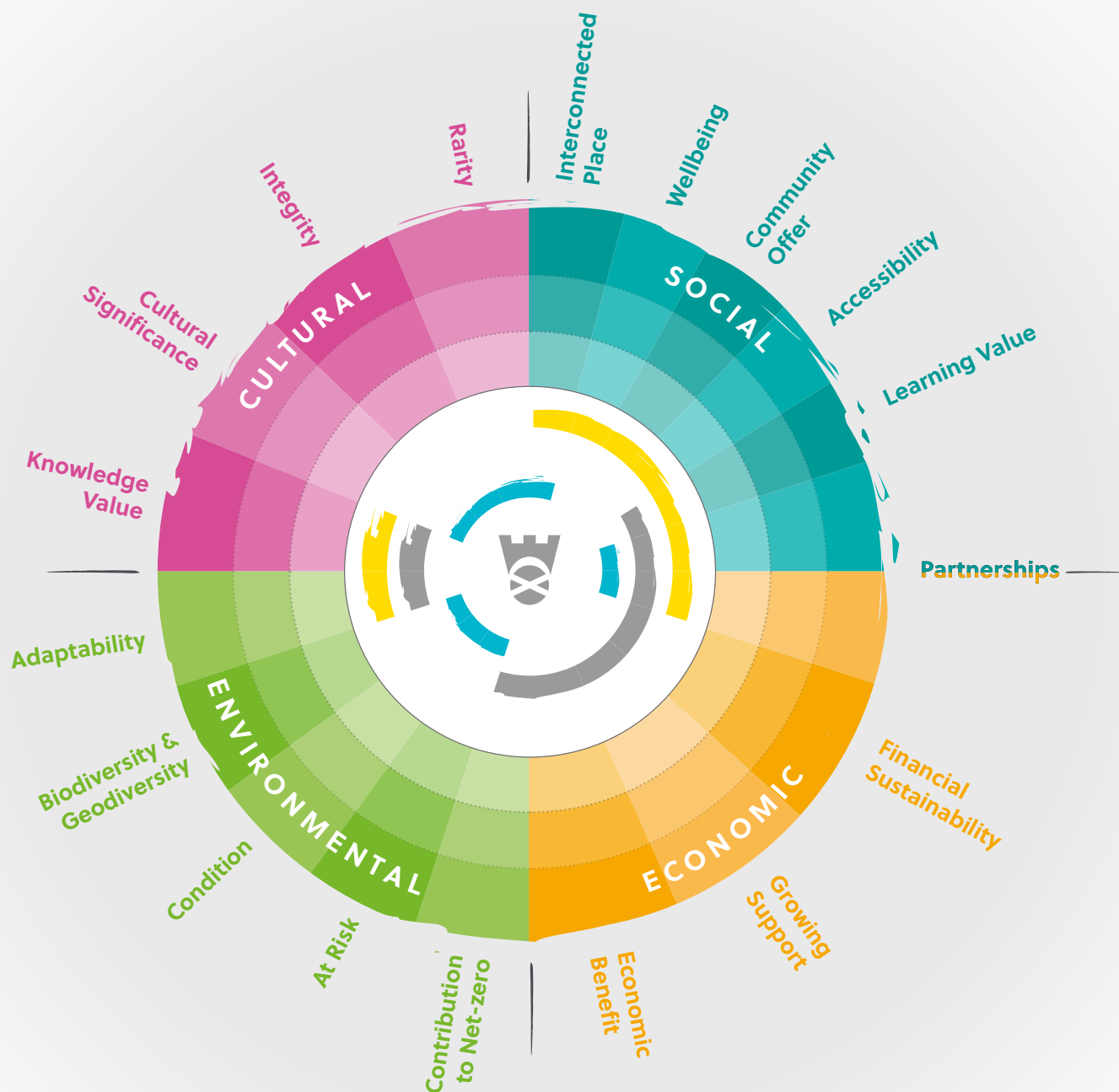
BEFS actions have supported key questions around past NTS work and future development. What the Trust has currently, and how it values its portfolio. A values framework, which is informed by the four pillars of sustainability: social, economic, environmental, and cultural factors; UN Sustainable Development Goals; and Scotland's National Performance Framework, as well as sector expertise during initial development; has been central to this process. The framework has been further developed and adapted to be applicable to the Trust Built Estate and the broader portfolio. Utilising developing work, such as recent research around Social & Economic Impact Assessment, Social Value Toolkit, and Natural Capital Approaches, amongst others. Bringing stand-alone Trust research and related projects into greater operational use. All underpinned by an in-depth consideration of the range and depth of data sources existing across the organisation and how these can, and do, inform values-based discussions.

The purpose of these values-based discussions, coalescing around the values framework, not only demonstrates the broad range of values being contributed to by the Trust across its portfolio, but enables more holistic understanding of the work ongoing across the organisation. Better appreciation across departmental and project boundaries, as well as expanding thinking as to how properties and people interact with place.

Subsequent learnings from these activities; and from the trialling of the values framework through a variety of Trust case studies drawn from a range of asset types, representing geographic breadth, Trust Regional diversity and reflecting current strategic priorities; have been explored as to how they relate beyond the Trust - through examination of values, acquisitions policies, and other asset holders' estates.



Values Framework Graphic, showing alignment with NTS Strategic Aims



NTS STRATEGIC AIMS

Engagement

- a leading provider of inspiring heritage visitor experiences in Scotland
- championing skills to support traditional conservation and innovation
- enable a greater number and diversity of people and communities to access our properties to improve their health and wellbeing

Sustainability






























































































































- a growing diverse organisation
- financially secure
- carbon negative by 2031
- investing in our own people, the volunteers and staff

Conservation

- stabilise and improve the condition of our heritage buildings
- enrich Scotland's protected heritage to make it relevant to more people
- enable nature to flourish across our countryside, gardens, farmed and designed landscapes
- speak up for our heritage which doesn't have a voice

The Portfolio Review has helped to reinforce the unique nature of the NTS amongst other cultural and heritage organisations, highlighting where opportunities for advocacy and partnership lie.

The scale, diversity and complexity of the Trust's influence is foregrounded, including exploration of the variety of management options utilised.

															
Asset Type	NTS	HES	NatureScot	Scottish Wildlife Trust	Woodland Trust Scotland	Forestry and Land Scotland	RSPB Scotland	John Muir Trust	Local Authorities	Church of Scotland	Historic Houses [owned privately]	Private	Network Rail	Scottish Canals	
Castles															
Historic Houses															
Gardens		[If linked to built site]													
Industrial Heritage															
Historic Infrastructure (i.e. bridges)	[if connected to existing sites]														
Religious sites															
Battlefields															
Memorials		[If linked to built site]													
Sites of Special Scientific Interest (SSSI)															
Special Areas of Conservation (SAC)															
Special Protection Areas (SPA)															
National Scenic Area (NSA)															
National Nature Reserve															
Local Nature Reserve (LNR)															
Scheduled Monuments															
Ramsar															
World Heritage Sites															
 Present  Present but Limited															

● Present ● Present but Limited

Academic partnership potential was explored through engagement with University of Stirling, providing researchers with an overview of the context, remit and emerging outcomes of the Portfolio Review. Working towards emerging research synergies between the staff of the National Trust for Scotland and researchers based in the Cultural Heritage Network at the University of Stirling. A Memorandum of Understanding between the organisations for future research work is being formed. The focus for the future should enable

researchers to show the Trust things it cannot see for itself, particularly in relation to public benefit.

This report advocates a revision of the Trust's current definitions of significance, moving from a primarily culture-focused understanding towards a holistic definition, including cultural, social, economic and environmental values. It also highlights methodologies for assessing these measurements of significance that have been, or currently are, being engaged with by the Trust.

BUILT ESTATE ANALYSIS

The completion of the Built Estate Asset Register (BE Register) was integral to this part of the process. The information within the BE Register enabled a new understanding of data relating to the built estate, and supported new questions being asked.

A deeper dive into built estate data enabled BEFS to examine the learning here, and find areas where representation in history, and geography, are less complete, and consider what this means for future acquisitions. Upon investigation there was a lack of National context and information within which to site the Trust's portfolio. This information was then highlighted as a wider sectoral need, detailing an area where Trust leadership could occur; this could be made in relation to the formation of a new national strategy for the historic environment, replacing Our Place in Time by 2024.

A number of detailed reflections are made based on Trust data around the Built Estate, but more generally we learn that what the Trust holds is highly designated, signifying that a high cultural value has been attributed to many specific buildings and sites. This prominence may be of note when considering a national picture and advocating for significant sites within wider prioritisation discussions.

Whilst acquisition will always be limited by both availability and resource, the information within the Built Estate Analysis report, and the wider work of the

Portfolio Review, enables informed decisions to be taken around what stories of Scotland the Trust will tell next. Those stories may reflect places where rural communities once flourished; under-represented groups (women, minorities within Scotland); areas where socio-economic change has reshaped our places through heavy industry; or the 'new heritage' formed after World War II, and now left to tell the stories that fewer people remember.

All examinations of the BE-Register have been at either Trust Regional level, or national scale. There remains significant opportunity using this data, and other social and economic research completed by the Trust, to interrogate what we know about what matters to people at a local level. Enabling the project to support respectful, accurate and authentic conservation and engagement.

Examining age, location and designation is the start of wider considerations that could site Trust properties as: National icons; sites of particular technological innovation; highlight individual and social connections with cultural movements or the arts; as well as explore the interaction of people with place – both what has been left 'wild' landscape and what has been formed as places of work, industry, and enjoyment, as well as homes. This, aligned to Portfolio gap-analysis developed from the Values Framework approach, enables the Trust to consider how it does, and how it wants to, tell more of the Stories of Scotland.

This report forms part of a suite of six documents relating to the Portfolio Review

- **EXECUTIVE SUMMARY**
- **PORTFOLIO REVIEW:** Insights, Values & Evaluation – report
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- **INSIGHTS:** Built Estate Analysis & Framework applicability and learnings

All data and comments were formed in late 2021- early 2022. All data was checked, and any presentation of that data is done in good faith, and to the best available knowledge, as taken from a variety of sources as was available at the time. Further actions should be based on the data available at the time of decision making, referencing the sources presented here – and considering any new information which may be pertinent.

BEFS extends thanks to all those within the Trust who have enabled access to information and given of their time and expertise. Particular acknowledgement is due to Stuart Brooks and Bryan Dickson who enabled and drove this project. Thanks also to Kirsty Haslam, Research Manager within BEFS, for her work on this project.



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