

INSIGHTS

Values Framework



**NATIONAL
TRUST *for*
SCOTLAND**

The National Trust for Scotland is a Scottish Charity, SC007410



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ABSTRACT

The INSIGHT: Framework pack has been produced by BEFS for the Trust as part of the Portfolio Review.

This provides background and formative information on the Values Framework, and also outlines use of the Framework, discusses applicability across a range of assets; details the Case-Study approach and learnings from the process; and supplies the Case Studies, the Values Framework Toolkit, and Workshop outlines; supporting NTS staff to engage with the Framework in the future.



VALUES FRAMEWORK

HOW THE SECTOR USES VALUES & SIGNIFICANCE

Within the Historic Environment, values and significance tend to get conflated. Statements of significance have long been the assessment of how we demonstrate the heritage 'value' of a site, place, or asset. These narratives and definitions tend to focus on the aesthetic and historical values ascribed to a place or object. Here, a holistic Values Framework was adapted for the Trust's use, broadening out how an asset is 'valued' beyond the cultural understanding; taking social, economic and environmental factors into additional consideration.

This Framework will allow the Trust to consider expressing the value of current sites holistically and transparently, while also supporting discussions and options for decision making, for the Portfolio of the future.

HOW THE TRUST USES VALUE & SIGNIFICANCE

The Trust uses values in order to understand the significance of our places.¹ In 2018, the Trust defined value as: 'the merit or regard we attach to a place, object or process'.²

For the Trust, significance,

*represents both the meaning of a place in the Trust's perception and how the Trust ascribes value to that meaning ... As an indication of the importance of a place or object, significance can include many different types of value (including cultural, natural, aesthetic, historical, scientific and social).*³

It was the significance of sites that was assessed in the 2012 Portfolio Review.⁴ The individual significance of sites is captured in site-specific Statements or Summaries of Significance which exist for Visited Properties and, increasingly also for non-visited properties.⁵ However, the Trust also recognises that what we value as a society can change. In the last decade, there have been significant national and international developments which have encouraged a change of thinking about what is valued. These include, but are not limited to:

- *The declaration of a Climate Emergency (Scotland 2019)*
- *The social and economic impacts of the COVID-19 pandemic (2020-2022)*
- *The political uncertainty prompted by Brexit and the ongoing discussion around Scottish independence*
- *Global social movements, exemplified by Black Lives Matter*
- *The development and wider availability of digital technology*

Additional context for the setting of international and national priorities has been provided by the Sustainable Development Goals, set in 2015, which have been adapted in the national context to form the Scottish Government's National Performance Framework.

To ensure organisational sustainability for the future, the Trust has engaged with developments such as these, while remaining committed to its founding principles and statutory commitments. This evolution is demonstrated through the new Strategy and the core commitments to conservation, engagement and sustainability.

It was important to adapt the Framework to fit the specific requirements of the Trust's entire portfolio. Adjustments included:



- A** Aligning the Framework with the Trust's statutory purpose and strategic priorities
- B** Including developments in terminology since the production of the original Framework, particularly regarding net-zero
- C** Reflecting the 'condition' of assets, as appropriately reflecting ownership by a conservation charity
- D** Producing a framework applicable beyond built heritage assets
- E** Ensuring values could be supported by accessible information

EMERGING SECTOR THINKING

The global heritage sector has increasingly recognised that a site's value is derived both from its traditionally agreed cultural value, and its potential to provide positive social, economic and environmental benefits. This is most clearly stated in the four pillars of sustainability, which are used by national and international bodies.⁶ These four pillars have been articulated, in the context of Scotland's built heritage, as:

- *Economic Sustainability – ensuring individual assets are financially secure, reducing reliance on on-going public funding and grants where possible; ensuring the asset's use is contributing to local prosperity*
- *Cultural sustainability – valuing the cultural significance of place and community, both tangible and intangible, connecting people to their places, stories, and folklore; preserving the character and heritage of an area (meeting the Place Principle)*
- *Social Sustainability – allowing communities to make the best use of their local asset base to deliver inclusion and wellbeing outcomes*
- *Environmental sustainability – putting heritage assets into the wider resource-efficiency agenda to use/re-use resources in the most efficient manner (as an alternative to vacancy or new build) to reduce Scotland's carbon footprint; and understanding how building fabric will be affected by climate change, and whether existing conservation approaches are sufficient to combat this⁷*

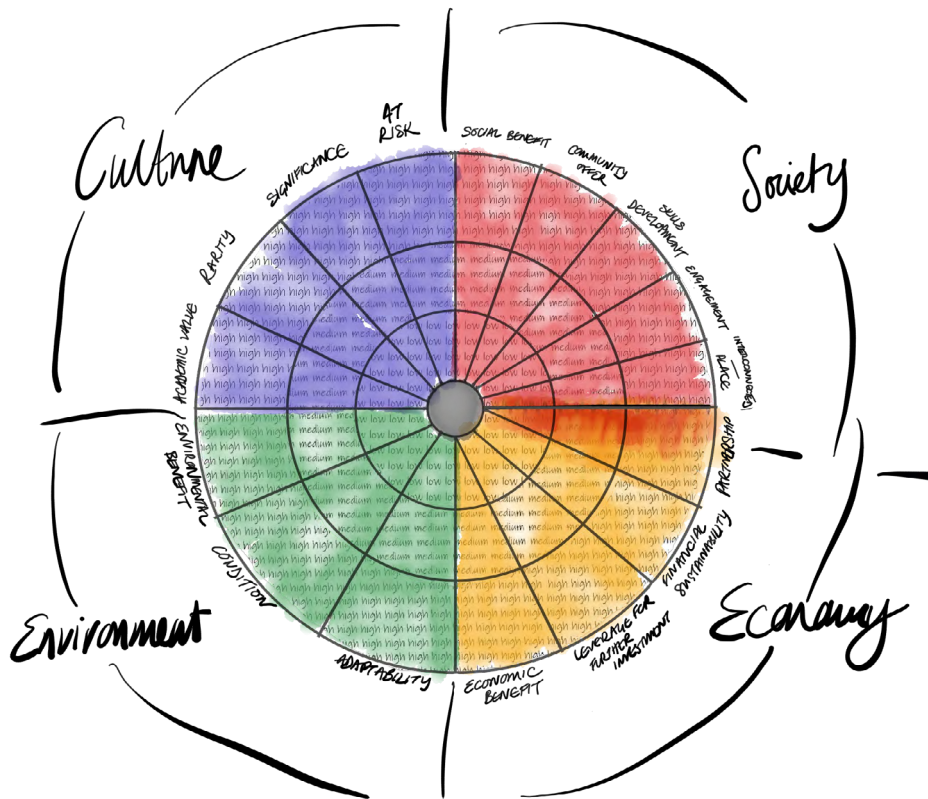
Specifically aligning the Trust's values with the four pillars of sustainability builds from the organisation's recent work, which has increasingly looked to highlight the economic, social and environmental value of sites. This not only includes site-specific Statements and Summaries of Significance but work such as the Social and Economic Impact Assessment Report (2021), the Social Values Toolkit (trialled at Newhailes, 2021), and Natural Capital Assessments for individual sites (2021/2).

DEVELOPING A VALUES FRAMEWORK FOR THE TRUST

In 2018 and 2019 the Sustainable Investment Toolkit (the SIT) was developed by the Our Place in Time – Built Heritage Investment Group. It involved an

extensive consultation process with a wide range of stakeholders, with the current beta version due to be released for sector use in 2022⁸.

The original Sustainable Investment Tool visual (below)



The framework was designed to be data led, and expertise informed. Conclusions make the most of the data, knowledge, and experiences relating to a site/asset. At times statistical, at times led by understanding and current direct involvement – this blended approach both provides nuance and leads to a robust final assessment.

It was important to adapt the Framework to fit the specific requirements of the Trust’s entire portfolio (triated with the built estate but designed to be used with all asset types). The experiential benefits visitors gain through interaction with the Trust’s assets are captured across multiple values in the Social quadrant, as well as Knowledge Value in the Cultural quadrant. (Specific adjustments relating to the Trust have been discussed above.)

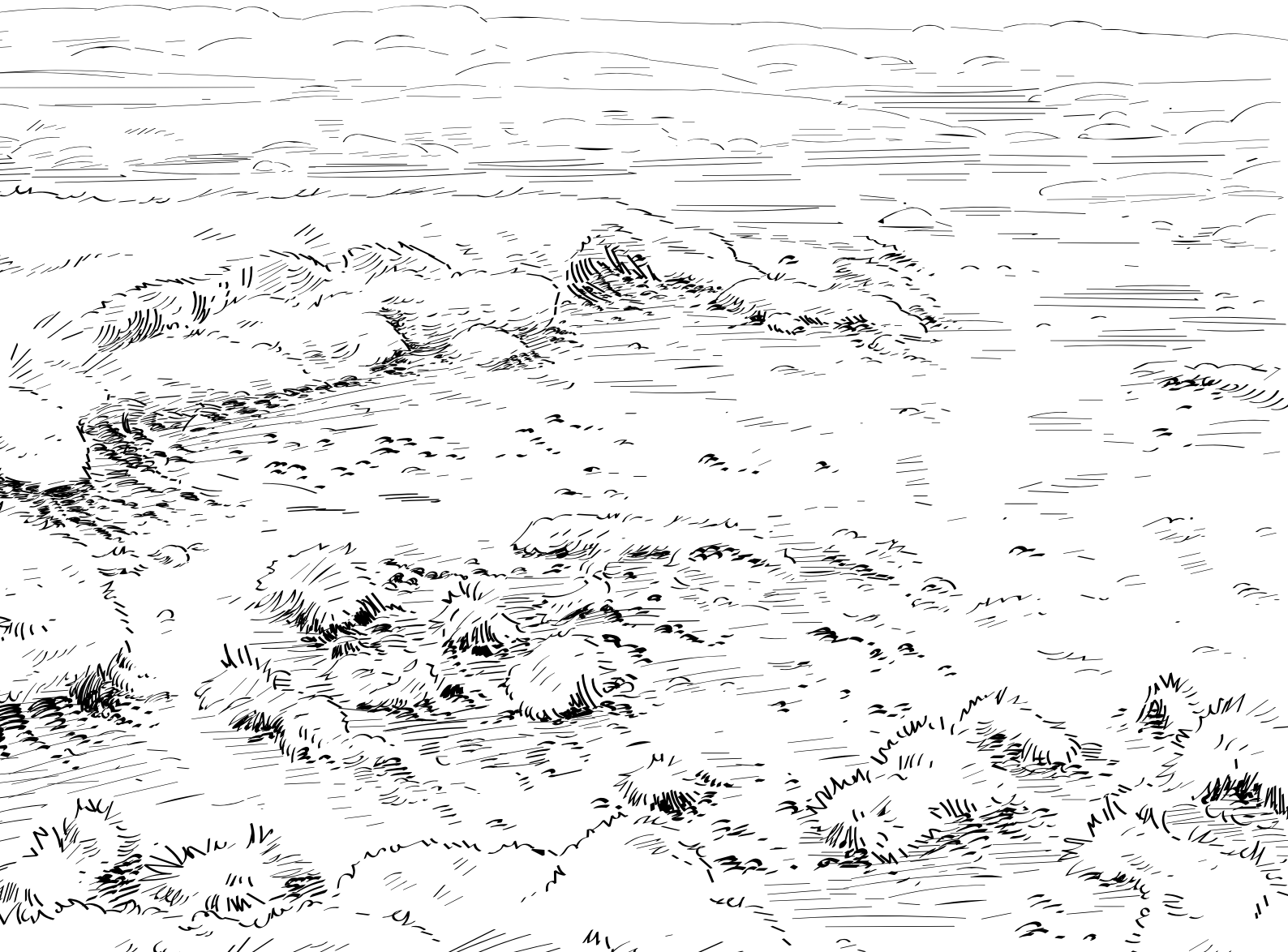
Where possible, the emphasis on individual judgement is reduced – both due to the rigour of the process, and the number of values taken into account when fully assess an asset or site. This is seen a benefit of the process, but can be an adjustment for those used to having the ‘final authority’ when assessing a site.

A range of 18 indicators, aligned with the organisation’s Strategic Aims, have been developed.

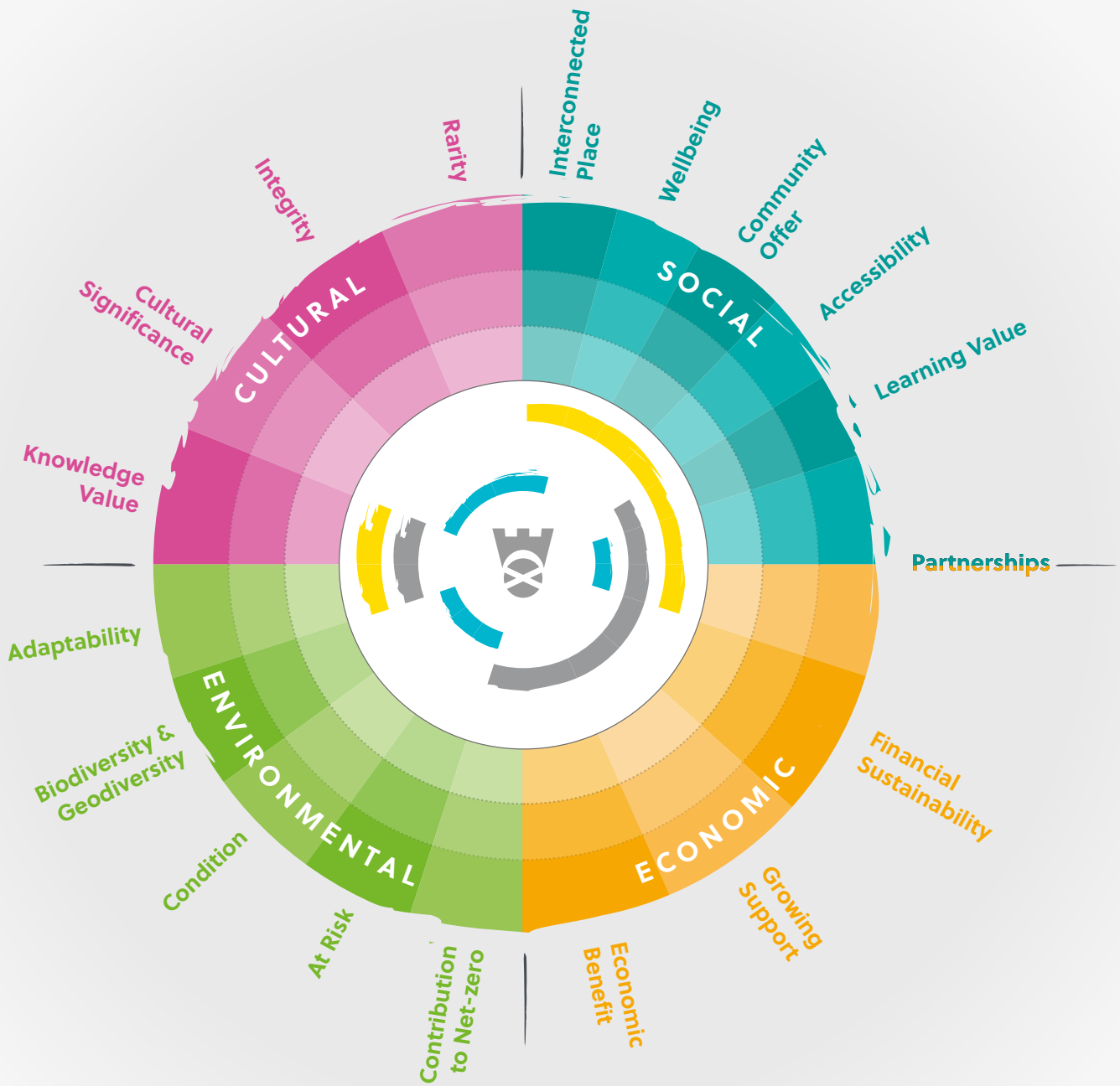
There is a detailed table supporting the Values Framework visual, highlighting the existing Trust activity and data sources, which can be used to assess

and inform the Value Indicators, when the Framework is being completed. This provides assurance that the values can be assessed against, or defined within, clear and constant parameters. This is enclosed within this document.

The Values Framework for the Trust has been developed through consultation with a variety of Trust staff, highlighting the extensive: expertise, knowledge, and ongoing work. Current gaps in understanding and information are acknowledged. Eight case-studies have been run to pilot the Trust specific Framework. (Full case studies are contained within this document.)



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

Quadrant	Segment	Definition	Descriptors	NTS - Strategy	Informed By:	Work in Development / Future Potential	Notes for working with Framework
			(Scale with 'High' and 'None' definitions provided for guidance)		Site General	Asset Specific	N.B. This reflects work at the level of the organisation not the site
Cultural	Knowledge Value	The extent to which a site/ asset has contributed to the canon of existing knowledge and research. Can incorporate quantity/ quality of existing site-specific records and archives as well as the work of existing research to indicate gaps	High: This site/ asset has significantly contributed to the existing canon of knowledge None: The site/ asset has no existing research connected to it and little potential to increase insight	● ●	<ul style="list-style-type: none"> Organisational/ Academic Literature Scale & quality of connected archives Existing/Potential Research Partnerships 	Archaeological sites: Archaeology Framework (2016) / 'An Archaeological and Historical Chronology' (2011) Quantity and Quality of Survey data (i.e. Archeological, Historic Landscape, Biodiversity reporting (Note not content of Surveys but to reflect historic site-specific data))	Development of academic partnerships to address existing knowledge gaps
Cultural	Cultural Significance	The extent to which a site/ asset has archaeological, architectural & technological, artistic, aesthetic, associative, commemorative, historical, scientific, spiritual/religions, symbolic/iconic value	High: The site/ asset is of national cultural importance None: The site/ asset is not of national cultural importance and has limited local importance	●	<ul style="list-style-type: none"> Existing Management Plans/ Property Statements Information collected for Designations (see 'Asset Specific' for specifics) and declaration of Inalienability where appropriate 	Built Estate: Scheduled Monuments, Listed Buildings Archeological sites: Internal assessment of significance of archeology at Visited Properties (Archeology Resource) Natural estate: i.e. IHB, NSA, SSSI, Historic Battlefields Moveable Collections: Significance ratings entered into Collections Database (note these are object specific) Gardens: IGDL; assessments within Garden Review (2017)	Recognised that captured information reflects current/historic understandings of significance. Particular potential to expand with increased understanding of what significance means to audiences (i.e. as captured by 'Culloden 300' Report)

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			<i>(Scale with 'High' and 'None' definitions provided for guidance)</i>		Site General	Asset Specific	<i>N.B. This reflects work at the level of the organisation not the site</i>
Cultural	Integrity	This measure focuses on the 'completeness' of a site/ asset to what is currently known of its original form, location and/ or design intent ¹	High: The site/ asset has had limited or no alterations retaining original features and context None: The site/ asset includes none of its original features and/or is divorced from its original context	●	<ul style="list-style-type: none"> Existing Management Plans/ Property Statements & Archeological & Historic Landscape Surveys Information collected for Designations (see 'Asset Specific' for specifics) and declaration of Inalienability where appropriate 	<p>Built Estate: Building Report, Historic Buildings Surveys</p> <p>Natural Estate: Existing ratings for 'Naturalness' / Human Impact on site</p> <p>Moveable Collections: Input related to provenance of collection/ collection indigenous to site</p> <p>Gardens and Designed Landscapes: Historic Garden Plans</p> <p>Archaeological sites: recognised that this would refer to the integrity of the archaeological site as documented</p>	
Cultural	Rarity	The extent to which a site/ asset is unique within the Trust Portfolio, within the locality, or nationally	High: There are few, or no other existing examples of this site/ asset nationally None: There are many other examples of similar sites/ assets within the Portfolio and/or within the site/ asset's locality	●	<p>Existing Management Plans/ Property Statements</p> <p>Situate within similar known examples in Portfolio and the wider sector (if known)</p>	<p>Asset Specific databases can provide an indication of the rarity of an asset within the Trust's portfolio</p> <p>Internal work has been done to situate the Trust's portfolio of archaeological sites alongside that of HES' Properties in Care</p>	<p>The challenge of situating information for the Built Estate within the wider sector is discussed within 'Built Estate Analysis' (2022) developed in parallel with this report.</p> <p>Recognised that there is the potential for an asset within a site to deviate from the site's norm. Where this has been deemed to be the case, it has been taken into account and acknowledged. It is acknowledged that there is an element of subjectivity regarding the emphasis that is placed on the individual asset (which would benefit from workshopping) but a greater impact has been noted if the exception impacts what is deemed to be the principal asset of a site.</p>

¹ This Indicator looks to combine two indicators from 'Evaluating Significance and Heritage Values' (2020): Authenticity and Natural Integrity. The definitions provided are: Natural Integrity: 'the degree to which a place or ecosystem retains its natural biodiversity and geodiversity and other natural processes and characteristics'; Authenticity: 'Expressed through a variety of attributes include: form and design; materials and substance; use and function; traditions, technique and management systems; location and setting; language, and other forms of intangible heritage; spirit and feeling; and; other internal and external factors; Attributes such as spirit and feeling do not lend themselves to practical applications of the conditions of authenticity, but nevertheless are important indicators of character and sense of place, for example, in communities maintaining tradition and cultural continuity.

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			<i>(Scale with 'High' and 'None' definitions provided for guidance)</i>		Site General Asset Specific	<i>N.B. This reflects work at the level of the organisation not the site</i>	
Social	Inter-connected Place	The inter-relation of the site/ asset with its surrounding environment i.e. view/ viewpoints, wider landscape/ townscape, relationship to other surrounding / nearby buildings	High: This site/ asset has particular value within its location and in relation to a wider landscape None: This site/ asset is stand alone and has little or no relationship with its physical locality		Recognition that designations often exist across Trust boundaries to reflect the wider landscape i.e. WHS, NSA, Wild Land Area, Local Landscape Designation, Conservation Area Understanding of historic interrelation between site and surrounding landscape (i.e. was once one estate etc) and impact of recent planning decisions/developments for housing or infrastructure	No current existing comprehensive method for assessment of landscape value The Social Value Toolkit, recently piloted at Newhailes, offers insight into local perceptions of the interconnectedness of place. New social media monitoring tool to collate images in development stage	The focus for this indicator is on the physical rather than the emotional interconnection of the site. The emotional interconnection would be captured within either cultural significance or wellbeing as appropriate.
Social	Wellbeing	The extent to which a site/ asset increases the wellbeing of an individual, incorporating both the physical and emotional benefits gained from the site ²	High: This site/ asset makes a significant contribution to the wellbeing of those who utilise the site/ asset None: The site/ asset has no wellbeing benefits connected to it or provides a negative contribution to wellbeing		Utilise relevant criteria within Visitor Surveys i.e. information linked to impact of visit on respondent	Tools are currently in development to measure baseline wellbeing at sites for existing outreach activity, young people, and community wellbeing pre and post participation activities The Social Value Toolkit has recently been trialled at Newhailes and has significant potential for increasing understanding of which aspect of sites contribute to wellbeing Integrate with understandings of emotional connection to place (also linked to Cultural Significance) i.e. Culloden 300 project Significant external work has been developed in recent years, particularly linked to the the importance of green space to wellbeing.	The potential for overlap between the emotions associated with a site's cultural significance (i.e. if a site is used as a memorial) with wellbeing is noted. To minimise this where possible, the Trust's current definition of wellbeing, with its focus on mental and physical health, prosperity, security and safety has been used as the primary guide for information recorded.

² The Trust's current definition of wellbeing is "a catch-all term to describe the state of an individual or collective (e.g. the nation) encompassing mental and physical health, prosperity, security and safety" (National Trust for Scotland, 'Field Guide', 2021).

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			<i>(Scale with 'High' and 'None' definitions provided for guidance)</i>		Site General	Asset Specific	<i>N.B. This reflects work at the level of the organisation not the site</i>
Social	Community Offer	The extent to which the site/ asset provides, or has the potential to provide, a variety of local community spaces or facilities which are widely utilised. This would encompass both Trust-organised services (such as play-areas, exhibition spaces) as well as the use communities make of freely accessible spaces (dog-walking etc)	High: This site/ asset is utilised by a wide range of community stakeholders through varied engagements None: This site/ asset has no spaces, facilities or ability to be utilised by community stakeholders	●	The Social and Economic Impact Assessment Report included an assessment the range and scale of on-site activity (i.e. guided tours, community gardening etc.) Map existing community offer in discussion with site staff and utilising advertised information relating to past and future events. There is significant work in development to develop and standardise information in this area across the Trust – see Future Potential	The Social Value Toolkit, completed for Newhailes, provides invaluable insight into perceptions of the current community offer provided by the site. There is significant interest to trial this at other sites. There is also an internal proposal to develop both a Community Engagement Audit tool and a metrics wheel, based on the Place Standard Tool, to help facilitate discussion with Communities about Community Impacts. New Participation, Consultation and Engagement Framework and Toolkit in development (developed from Trust's Community Engagement Policy) to support decision making around community engagement. There is also developing work connected to relevance ie. Developed PhD proposal, discussion with pilot study with Leeds Museums and Galleries that includes relevance as part of commissioned conservation plans. New social media monitoring tool to collate mentions/topics etc in trial stage. Seperate project to do similar for images in development stage.	

Quadrant	Segment	Definition	Descriptors	NTS - Strategy	Informed By:	Work in Development / Future Potential	Notes for working with Framework
			(Scale with 'High' and 'None' definitions provided for guidance)		Site General	Asset Specific	N.B. This reflects work at the level of the organisation not the site
Social	Accessibility	The extent to which an individual is able to relate to and interact with an asset. As indicated in the Trust's definition of accessibility this includes both physical and intellectual accessibility and can include real and virtual access ³	High: This site/ asset can be easily accessed by a diverse audience None: This site/ asset cannot be accessed and digital access or information is limited	●	<p>Accessibility Guides (where developed): Website/Staff consultation if not; Demographic information from Visitor Surveys</p> <p>Assessments of accessibility should, where possible, recognise the combination:</p> <ul style="list-style-type: none"> • Accessibility of Location (to public and private transport as well as for active travel) • Physical Accessibility of site (parking, level access, accessible toilets, accessible communication, lighting assessments etc.) • Digital Accessibility of site (content on Trust's website, analytics of engagement with website, presence on social media platforms etc.) • Inclusion of diverse audiences 		<p>The Social Value Toolkit, recently piloted at Newhailes, provides insight into how accessible the site is perceived to be by its local community</p> <p>An Audit Tool/ Standardisation Template for site-specific Site Access Statements is under discussion</p> <p>Increased digital analytics can be incorporated into information collated</p>

³ The National Trust for Scotland's current definition of Access is 'The right or ability to enter, approach or make use of a place or thing. The Trust's integrated approach to access requires us to use the term to refer to a whole range of methods that people use to relate to and interact with the organisation, including physical, intellectual and sensory. This can include real and virtual access' (National Trust for Scotland, 'Conservation, Learning, Access and Enjoyment Principles'(2018).

Quadrant	Segment	Definition	Descriptors	NTS - Strategy	Informed By:	Work in Development / Future Potential	Notes for working with Framework	
			(Scale with 'High' and 'None' definitions provided for guidance)		Site General	Asset Specific	N.B. This reflects work at the level of the organisation not the site	
Social	Learning Value	The extent to which a site/ asset enables the development of skills and training for staff and volunteers and supports learning for visitors across both formal and informal education, and including a broad spectrum of learners ⁴	<p>High: This site/ asset contributes significantly to learning across a wide range of learners (both formally and informally)</p> <p>None: This site/ asset contributes little or nothing to formal or informal learning</p>	<p>● ●</p>	<p>Site specific information related to:</p> <ul style="list-style-type: none"> • Numbers engaged (Workshops/ Programmes etc) • Variety of learning opportunities offered • Any feedback gathered from participants for effectiveness of formal learning programmes • Presence/Absence of interpretation <p>Information related to Learning captured within Visitor Surveys</p> <p>Site-specific skills development for staff and volunteers (particularly related to traditional skills etc)</p>	<p>It may be useful to place this information within the context of the information captured within the Socio-Economic Impact assessment Report (2021)</p> <p>The proportion of visitors who described learning more about the place and its stories as having a strong influence on their decision to visit individual sites include:</p> <ul style="list-style-type: none"> • Historic Houses & Palaces: 71% • Castles/ Forts: 42% • Heritage Centres: 83% • Gardens: 25% • Other Historic Properties: 52% • Outdoor Nature Attractions: 26% • Industrial/Craft: 78% 	<p>It is noted that a Group Activity sign-up sheet was developed in 2021. It includes a Skills Development category to record the intended skills development of any group volunteer activity and Year 1 activity related to volunteer groups has been analysed. This provides a post pandemic baseline for participation hours across volunteering, community partnership working and targeted groups and could be integrated into understandings of site-specific skills development</p>	<p>Recognised that assessments of interpretation and learning opportunities can be challenging to separate from subjective assessments of quality. Subjective information would benefit from additional input (i.e. in workshop format) to ensure consistency and Portfolio-wide perspective</p>

⁴ The Trust's current definition of learning is defined as 'enriching people's lives by sharing knowledge. Learning includes formal and informal education and is the process by which the Trust shares information on subjects and issues. Learning enables people to develop skills for use in many aspects of their lives and provides people with opportunities to learn more about how and why things happen, often providing first-hand experiences to learn from. We also learn from others and by evaluation of our own activities' (National Trust for Scotland, 'Conservation, Learning, Access and Enjoyment Principles' (2018)).



Quadrant	Segment	Definition	Descriptors	NTS - Strategy	Informed By:	Work in Development / Future Potential	Notes for working with Framework
			<i>(Scale with 'High' and 'None' definitions provided for guidance)</i>		Site General Asset Specific	<i>N.B. This reflects work at the level of the organisation not the site</i>	
Social AND Economic	Partnerships	The extent to which the site/ asset has partnerships in place with other organisations, groups or individuals, ranging from national organisations to community partners	High: This site/ asset has a wide range of strong, purposeful collaborations in place None: This site asset has no partnerships currently in place	● ● ●	Acknowledge both: <ul style="list-style-type: none"> Site-specific partnerships Organisation-wide partnerships with direct implications for the site <p>Consideration should also be given to the strength and length of time over which partnerships have existed.</p> <p>Mapping exercise with site staff to reflect range of partnerships currently in place at the site</p>	New organisational partnerships are being set-up i.e. as part of the Participation programme to help deliver new initiatives (include Raleigh International, Paths for All Scotland, Venture Trust etc.) plus local community groups for the delivery of NTS Green Action	The potential for both formal and informal partnerships at a given site is acknowledged and both have been acknowledged where this information is known. Particular note has been taken to acknowledge formal partnerships where these exist as this is recognised to offer a degree of stability that can be, but is not always, in place for more informal arrangements
Economic	Financial Sustainability	The extent to which the site/ asset is financially sustainable without external subsidies but including site-specific funds and endowments	High: This site/asset is financially sustainable with no need for external subsidies None: This site/asset is not currently, or historically, financially sustainable and relies heavily on external subsidies	●	Internal site-specific financial information related to Net income	Built Estate: Include ARG eligibility where applicable	A Natural Capital Baseline of the National Trust for Scotland Estate Executive Summary, March 2022 - Natural Capital Research Ltd.

Quadrant	Segment	Definition	Descriptors	NTS - Strategy	Informed By:	Work in Development / Future Potential	Notes for working with Framework
			<i>(Scale with 'High' and 'None' definitions provided for guidance)</i>		Site General	Asset Specific	<i>N.B. This reflects work at the level of the organisation not the site</i>
Economic	Growing Support	The extent to which the site/ asset is central to the organisation's profile and has historically been used for fundraising and advocacy	High: This site/ asset is of significant importance to growing support for the Trust and has a highly visible profile for the organisation None: This site/ asset is of limited importance to growing support for the Trust and has a limited/no profile within the organisation	●	This measurement can include: <ul style="list-style-type: none"> Total number of visitors to the site Visitor Break-down (i.e. Member/Non-Member; UK/Overseas) Site-based membership sign-up Site specific fundraising Profile (visibility in Trust marketing, visibility on social media) Site-specific Member Centres /Friends Groups 	New social media monitoring tool to collate mentions/topics etc in trial stage. Seperate project to do similar for images in development stage.	It is recognised that current assessments of a site's profile is focused on visitor engagement - assessing the site's profile more widely is challenging although does offer scope for future research.
Economic	Economic Benefit	The extent to which the site/ asset provides economic benefit for the local area (local procurement, local employment, local tourist spend etc.)	High: This site/ asset contributes significantly to the local economy though employment, tourism etc None: This site/ asset does not provide economic benefit to the local economy	●	Draw on the information developed within the Social-Economic Impact Assessment Report (including data related to employment, project and procurement expenditure & contractors and visitor impacts) Site may also have access to supplementary data to deepen understanding		

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			<i>(Scale with 'High' and 'None' definitions provided for guidance)</i>		Site General	Asset Specific	<i>N.B. This reflects work at the level of the organisation not the site</i>
Environmental	Contribution to Net-zero	The extent to which the site contributes to the mitigation of climate change through carbon storage and sequestration and the reduction of emissions on-site	<p>High: This site/asset makes a significant / proportionate contribution to be carbon negative by 2031</p> <p>None: This site/asset is currently damaging to the environment and has limited/ no potential for adaption to contribute to net zero</p>	●	<p>Utilise information from Natural Capital assessments of the site particularly relating to carbon storage and sequestration</p> <p>Account for Promotion of active travel on site as well as information related to on-site energy use (energy system, machinery etc)</p>	<p>Built Estate: EPC's, Method of energy supply</p> <p>Trust carbon reporting requirement through SECR (Streamlined Energy and Carbon Reporting)</p>	<p>Sector work looking at Carbon Embodiment in buildings (i.e. Historic England 'Carbon in the Built Historic Environment' (2019)</p> <p>Planning involvement in workshops looking at Climate Vulnerability Index Workshop and Adapt Northern Heritage Workshop</p> <p>MSc dissertation proposal developed with UoS focused on integrating considerations of environmental values and impacts and mitigation of climate change into assessments of significance and development of long term vision.</p> <p>Planned introduction of new Environmental Management Scheme (EMS) with associated carbon plans at site/asset/individual level</p>

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			<i>(Scale with 'High' and 'None' definitions provided for guidance)</i>		Site General	Asset Specific	<i>N.B. This reflects work at the level of the organisation not the site</i>	
Environmental	At Risk	The extent to which a site/asset is considered to be at threat. Primary threats can include the changing climate or planning/physical encroachment	<p>High: This site/asset is at significant risk from the impact of climate change and other external factors</p> <p>None: This site/asset is not at specific risk from the impact of climate change and other external factors</p>	●	<p>This measurement should take into consideration the At Risk Matrix, developed in alignment with the methodology developed with Historic Environment Scotland (HES), the National Trust and 3Keel. This Matrix is divided into four categories, ranked currently and for future potential across:</p> <ul style="list-style-type: none"> • Overheating & humidity • Storm Damage • Slope Failure • Soil Heave <p>Other factors may include live planning applications and related landscape impacting works.</p> <p>Additionally any collected information related to pests/invasive species and diseases which negatively impact the site</p>	<p>Natural Estate: The developing Natural Capital data includes information related to soil erosion prevention and flood risk reduction</p> <p>Individual site and species plans e.g. for seabirds and arctic alpins</p> <p>Planning applications - tracked through Local authority portals</p>	<p>There is the intent to update the At Risk Matrix. Potential to explore the social perception both of risk and what should be prioritised for protection</p>	Assets within the Portfolio can be at risk because of poor condition. While this is an example of double-counting within the Framework, it has been noted.

Quadrant	Segment	Definition	Descriptors	NTS - Strategy	Informed By:	Work in Development / Future Potential	Notes for working with Framework
			<i>(Scale with 'High' and 'None' definitions provided for guidance)</i>		Site General	Asset Specific	<i>N.B. This reflects work at the level of the organisation not the site</i>
Environmental	Condition	The extent to which the site/asset is maintained to a high-conservation standard	High: This site/asset is in a sustained exceptional condition None: This site/asset is currently in a very poor condition	●		Built Estate: 'General condition' in Estate Classification Database; Quinquennial Surveys; Asset-specific 'Health Checks' as well as Conservation Performance Indicator (CPI) assessments. Natural Estate: NatureScot condition monitoring programme, property specific monitoring programme including as part of national schemes such as breeding seabirds Moveable Collections: Information recorded for individual objects on collections database. Condition monitoring for interior spaces. Gardens: CPI's in place for Gardens	Conservation Performance Indicators (CPI) to be developed for Landscape Need to ensure consistent recognition of what 'high-conservation' standards are for assets across the organisation. Recognised that there is the potential for an asset within a site to deviate from the site's norm. Where this has been deemed to be the case, it has been taken into account and acknowledged. It is acknowledged that there is an element of subjectivity regarding the emphasis that is placed on the individual asset (which would benefit from workshopping) but a greater impact has been noted if the exception impacts what is deemed to be the principal asset of a site.
Environmental	Biodiversity & Geodiversity	The extent to which the site supports biodiverse habitats and species and represents varied geology	High: This site/asset supports significant biodiversity and represents varied geology None: This site/asset supports limited/no biodiversity and little geodiversity	●	Information connected to Designations i.e. NNR, MCA, SSSI, SPA, SAC, Ramsar Results of biodiversity monitoring occurring on site Information contained within Management Plans	Natural Estate: Natural Capital model captures information related to biodiversity and pollinators; Species specific information, Conservation performance index (CPI) and NatureScot remedies database used to track status of designated features Gardens and Designed Landscape: Plant, including tree, surveys	New Plan for Nature to be published in 2022 – will identify key themes and programmes/ projects for nature across the Trust estate

Quadrant	Segment	Definition	Descriptors	NTS - Strategy	Informed By:	Work in Development / Future Potential	Notes for working with Framework
			<i>(Scale with 'High' and 'None' definitions provided for guidance)</i>		Site General	Asset Specific	<i>N.B. This reflects work at the level of the organisation not the site</i>
Environmental	Adaptability	The extent to which the site can be adapted or re-interpreted to suit developing need ⁵	<p>High: This site/asset can be adapted to suit current and future need</p> <p>None: This site/asset either cannot adapt or there is little or no demand for its adaption</p>	 	Range of current use, Range of potential changes of use, potential for asset re-interpretation	<p>Built Estate: Range of Current Use captured in the Estate Classification Database</p> <p>Natural Estate: Range of current use captured in Natural Capital Framework</p>	It is acknowledged that the potential for adaption can vary depending on investment. This indicator is aimed to capture the potential for adaption that would not fundamentally undermine the organisation's current understanding of the site's significance

⁵ This definition is compatible with the Trust's current definition of adaption as 'changing a place to suit the existing use of a proposed use' (National Trust for Scotland, 'Field Guide' (2020)).

WHAT WE LEARNT FROM PILOTING THE TRUST VALUES FRAMEWORK

More detail is provided in the case study set-up & reflections below.

Reflections included:

- *A Rapid Assessment process was an effective methodology for gathering information quickly and at scale. It was only possible due to the significant degree of pre-existing information that the Trust holds.*
- *Consultation with a broad range of Trust experts, contributes specific knowledge to individual Indicators, and mitigates the limitations of rapid assessment.*
- *Any potential subjectivity would be reduced with increased consultation although it is recognised that those consulted will also bring their own understandings and perspectives on sites to the Framework.*

During the course of the case studies a number of indicator specific reflections occurred. Where relevant these have been factored into the Values Framework table (extract above).

A principal of the rapid assessment toolkit was to utilise the significant amount of information that the Trust already holds about sites. However, this can lead to some restrictions and potential for inconsistencies within Indicators.

- *Quality/Quantity of source data e.g. Observations based on Visitor Surveys can be limited by the scale of surveys received for sites.*
- *Impact of COVID-19 pandemic: It is recognised that some of the information utilised was gathered during the COVID-19 pandemic (i.e. Visitor Survey replies for 2020 and 2021) while other sources (i.e. Social and Economic Assessment Report) utilised pre-pandemic information (2019/20) to negate this impact.*
- *Incorporating work specifically commissioned for sites: Some sites have work that has been specifically commissioned for that site and which have proved particularly valuable to*

inform specific indicators. These included the Social Value Toolkit which was trialled at Newhailes,⁹ 'Culloden 300: Living with the Battlefield, which focused on understanding the emotional connection visitors have to Culloden,¹⁰ and the site-specific economic benefit report commissioned for Fyvie.¹¹

- *Accounting for New Information: Case studies capture the information that was available at the time of completion. New information or insight both internally and within the broader sector, particularly related to 'Wellbeing' and 'Contribution to Net-zero', might impact an indicator's assessment and the Framework can be revised accordingly.*

Building upon the learnings from the Pilot case study process a recommended approach to utilising the Framework in the future has been developed. This combines a desk-based application of data sets (as was conducted during pilot case studies) with a workshop format that looks to draw on additional expertise and experience that might not be captured by datasets.

Consider rapid assessment of portfolio with values framework, based on case study approach and insight.



Approach used – Rapid Assessment Process (seen below on the left):

Applying the framework to an asset / site

Rapid Assessment Process	Recommended Approach (Portfolio wide assessment)
<i>As carried out as part of this review.</i>	<i>See Toolkit in INSIGHTS: Framework paper for more detailed understanding</i>
Consider if this is the first values framework assessment – if so, consider current situation (including already agreed future works).	Consider if this is the first framework assessment – if so, consider current situation (including already agreed future works) NOT potential. Potential can be noted and then assessed individually at a later stage.
Preliminary: Desk Based application of data sets to values – factual + <i>Gathers information quickly at scale.</i> Assess information gaps	Preliminary: Desk Based application of data sets to values – factual Assess information gaps
Site/Area operations staff Provides information and views to enhance Rapid desk-based assessment. Provided context and current activity.	Site/Asset Workshop/s Engaging teams across the site, or those working with the asset, to both give views on data gaps (where they occur) and enhance initial assessment, taking into account both experience and expertise which may not be captured by any specific data sets. Provides detailed context and current activity.
Feedback Once completed -seek feedback from those interviewed, and Trust senior team member/s.	Seek additional views If an area of disparity/contention – this may be across a knowledge area or geographic area. Take a pragmatic and proportionate approach.
Comparison By researcher, across completed case studies to assist with consistency of approach.	Overview/Comparison Considered by appropriate Trust senior manager/s to ensure consistency of approach.
	Review and Re-examination Should significant change occur to asset or site.

FRAMEWORK APPLICABILITY

WHAT CAN THE FRAMEWORK BE USED TO ASSESS?

The SIT Framework was originally designed to focus on built assets. Therefore, one of the required adaptations for the Framework was to acknowledge that Trust sites contain multiple assets across a range of asset types (built estate, gardens and designed landscape, moveable collections etc). For visitors, leaseholders, staff, and volunteers, sites are usually appreciated holistically. To reflect this, and ensure adaptations for the Framework were appropriate, most of the case studies are for sites. One asset-specific case study was also completed to demonstrate that the Framework can continue to be used to inform future decision-making at the level of specific assets.

Building from the significant amount of information about Trust sites, the Values Framework can therefore:

- *Highlight the potential for individual sites, or assets, to demonstrate key organisational values*
- *Highlight the opportunities sites, or assets, represent to enhance the delivery of the Trust's Strategy*
- *Allow for the identification of actions to improve performance and consider future investment*
- *Support the shaping of priorities for future acquisitions by identifying gaps within the existing Portfolio*

Reflecting Investment

The SIT was, in part, created to demonstrate the impact of potential investment into a built asset and the Trust's Framework can also be used to capture the 'before' and 'after' for a proposed project. This can help to clarify the values that would be developed as a result of an investment, supporting both internal and external understanding of the project.

Using the Framework for Advocacy

The Trust is committed to speaking up for heritage which doesn't have a voice. If sites have been historically used for advocacy this can be captured within the 'Growing Support' Indicator. However, for new areas where the Trust wishes to engage, the Framework can act as a tool for future advocacy, visualising both the variety of, and specific benefits, that individual sites can contribute.

DEVELOPING THE FRAMEWORK IN THE FUTURE

The Framework could also be developed further in the future. Avenues to explore include:

Scoring: The current Framework uses a 'sift' rather than a score approach. This builds upon both internal and external thinking and recognises that the amount of information needed to give a numeric score for each indicator would be vast. However, this could be developed, particularly for individual assets, if this was useful.

Weighting: Putting emphasis on any particular quadrant, or segment, and giving this more importance to that would be considered 'weighting'. Weighting can be applied to the Framework to represent particular management or strategic priorities. However, it is suggested that the weighted assessment of an asset should occur only after an initial un-weighted assessment has been completed to reduce the possibility that avenues for opportunity would be missed.

Weighting would be likely to reflect the extent to which intervention at a site can be directly impacted by management decisions.

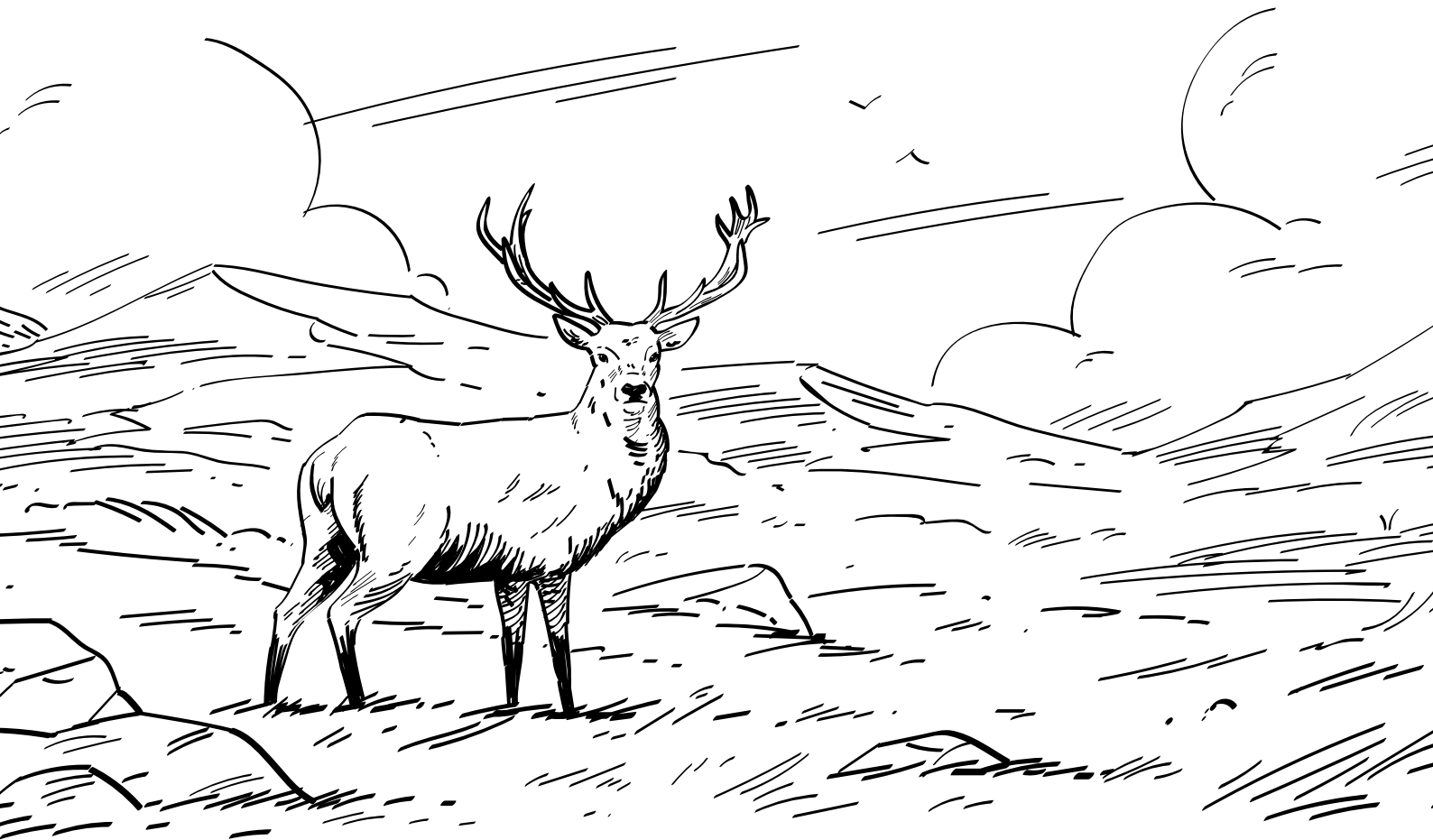
Management Decisions: Increased Ability to Impact →

[value] can be enhanced but it is also recognised that there are locational restrictions on what is possible

Limited Ability to Impact	Management can Impact but External Engagement can also be required	Management Can Directly Impact
Cultural Significance	Wellbeing	[Accessibility]
Rarity	Interconnected Place	[Community Offer]
[Biodiversity & Geodiversity]	Partnerships	Learning Value
[At Risk]	Economic Benefit	[Financial Sustainability]
	Knowledge Value	Growing Support
	Integrity	[Contribution to Net Zero]
		Condition
		Adaptability
		[Biodiversity & Geodiversity]
		[At Risk]

Informing Future Research

Using the Framework can highlight and co-ordinate areas in which there is current research and help to inform the direction of future studies. An indicator with particularly scope for future research is 'Rarity', particularly the rarity of sites within Scotland as a whole. Research could focus on both the physical rarity of a given typology across Scotland, but also how this influences engagement by both specialists and the wider public.



CASE STUDY SET-UP & REFLECTIONS

THE VALUES FRAMEWORK – PILOTING ACROSS THE PORTFOLIO

To pilot the Values Framework, eight case studies were completed. These were developed to reflect the variety of scale, complexity and location, within the Trust's current portfolio.

Due to ongoing restrictions related to COVID-19, and the storm Arwen damage in early 2022; the Pilot Case studies were designed as a desk-based, rapid assessment. Information to inform the process was gathered from a wide variety of organisational and site-specific sources. A discussion was also held with at least one member of staff with responsibility for each site. Emphasis was placed on utilising accessible Trust information.

The INSIGHTS: Framework document provides a summary of each pilot case study. This serves to evidence the process and will provide context for further implementation of the Values Framework.

Learning from each case study has been inbuilt into the finalised Framework.

CASE STUDY SELECTION

A number of criteria were utilised to create a short-list for priority case studies. These included:

- **Range of site types:** It was considered vital to trial the Framework on a range of sizes and types of site
- **Geographic Diversity:** It was important to identify case study sites that represented the geographic reach of National Trust for Scotland sites
- **Strategic Priorities:** Sites were short-listed if connected to some of the Trust's Strategic Priorities including:
 - Growing Visitor Numbers
 - Buildings at Risk Register
 - Major Capital Project proposed
- **Avenues from Developed/Developing Data Sources:** Analysis from the Built Estate Asset Register highlighted a number of avenues within the Portfolio which offered opportunities for further discussion and have influenced the choice of case studies. These included:
 - Location within Urban and Rural Communities
 - Sites that included leased assets
- **Previous Assessments of Significance:** Sites were selected that provided examples assigned 'Exceptional', 'Considerable' or 'Some' significance within the 2012 Portfolio Review.

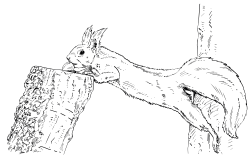
It was also important to work with sites that had the capacity to engage with the process.

Additionally, the decision was taken also to run the Framework for an individual built asset (Fyvie Home Farm) within a wider case study site. This highlights the potential for the Framework to be used both as a tool to understand sites as a whole, as well as the individual assets located within them.

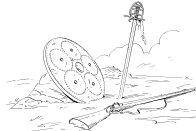
The finalised case study sites were:

Asset Type	'Focused' Asset Type	Multi-Asset Type
Built Heritage	Finavon Doocot; Fyvie Home Farm	Balmacara Fyvie
Nature & Wild Landscape	St Abb's Head	Newhailes
Cultural Landscape/ Battlefield	Culloden	
Garden/Designed Landscape	Pitmedden	

Case Study Locations



📍 **BALMACARA**



📍 **CULLODEN**



📍 **PITMEDDEN**



📍 **FINAVON DOOCOT**



📍 **FYVIE HOME FARM (FYVIE CASTLE)**



📍 **NEWHAILES**



📍 **FYVIE**



📍 **ST ABB'S HEAD**



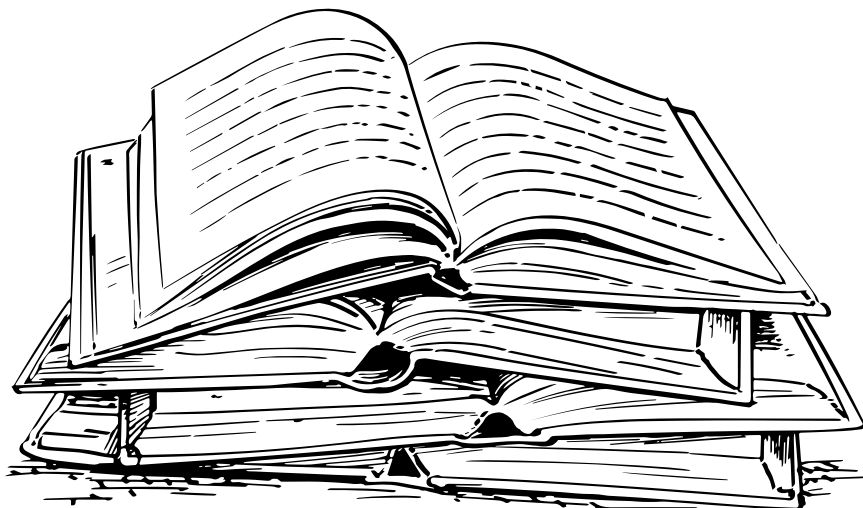
METHODOLOGY FOR CASE STUDIES

The case studies were completed as a rapid assessment process by an individual, external to the Trust over a three-week period in late February and early March 2022.

Information was gathered from a variety of sources and each case study involved a conversation with at least one operational member of staff connected to the site. These conversations highlighted site-specific information, or research, that was then taken into consideration. They also provided additional context, particularly on recent or ongoing activity.

Information consulted for all sites included:

- *Heritage Planning Sheets*
- *Historic Management Plans*
- *Property Statements (Historic and current)*
- *Forward Plans*
- *Vision and Master Plans*
- *Statements of Significance*
- *Key Features Tables (where available)*
- *At Risk Matrix – Internal and in alignment with the methodology developed with Historic Environment Scotland (HES), the National Trust and 3Keel*
- *National Trust for Scotland Website (property specific pages/articles)*
- *Assorted social media profiles for case study sites (link through Property specific Trust webpages)*
- *National Trust for Scotland, The Archaeological Resource (2017)*
- *National Trust for Scotland, Archaeological and Historical Chronology (2011)*
- *Results from National Trust for Scotland Visitor Surveys (2019-21)*
- *National Trust for Scotland site-specific Visitor Numbers (2019-21)*
- *National Trust for Scotland site-specific Membership sales (2015- 21)*
- *Evaluating the Social and Economic Impact of the National Trust for Scotland (Wavehill, 2021) and relevant site-specific data generated during this Assessment*
- *[Natural Capital Reports]*
- *National Trust for Scotland Natural Heritage Basic Site Information (Excel Spreadsheet)*
- *National Trust for Scotland Built Estate Asset Register*
- *HES, Historic Environment Portal (<http://portal.historicenvironment.scot/>)*
- *Canmore (<https://canmore.org.uk/>)*
- *PastMap (<https://pastmap.org.uk/>)*



Site Specific information included:

Balmacara	Culloden	Finavon Doocot	Fyvie	Newhailes	Pitmedden	St Abb's Head
J. Carter, 'Balmacara Estate Interpretation Review' (2015)	K. Boal & R. Curtis-Machin, 'Culloden 300: Living with the Battlefield' (2019) - Full Report and Summary	I.M. Davidson, 'Conservation Statement: Finavon Doocot' (2019)	Internal document highlighting Key Collection Items	National Trust for Scotland, 'Newhailes Conservation Plan – Draft' (2000)	National Trust for Scotland, 'Garden & Designed Landscape Heritage Overview: Technical Information and Guidance' (2021)	C. Hatsell, 'St Abb's Head National Nature Reserve Seabird Report Summary for 2021' (2021)
K. Dallas, 'Balmacara Estate: Landscape Character Assessment & Landscape Questionnaire' (2015)		Alder Archaeology Ltd, 'Finvon Doocot Angus: Historic Building Recording for the National Trust for Scotland' (2012)	BiGGAR Economics, 'Economic Impact Assessment of NTS Proposals for Fyvie Castle' (2019)	National Trust for Scotland, 'Designed Landscape & Gardens Conservation and Management Plan' (2005)		Scotland's National Nature Reserves, 'Scotland's National Nature Reserves', https://www.nnr.scot/ (Accessed 17/02/22)
National Trust for Scotland, 'Balmacara's Archaeological Sites' (2004)				E. Robson, 'Newhailes House and Gardens Social Values Assessment Report' (2022)		
[NTS Crofting Policy]				National Trust for Scotland, 'An Archaeology Guide to Newhailes' (2017)		
				National Trust for Scotland, 'Historic Designed Landscape Conservation Plan' (2000)		

Once compiled, the case studies were sense-checked against each-other by the assessor, and all members of staff interviewed were given the option to feedback on a draft Values Framework. Preliminary

feedback from the Trust's Senior Heritage Planner was also provided. Feedback has been incorporated into the reflections, and future process, detailed below.

REFLECTIONS ON THE CASE STUDY PROCESS

Methodology

A Rapid Assessment process was considered an effective methodology for gathering information quickly and at scale. It made use of the significant degree of pre-existing information that the Trust holds, highlighting that while additional information can be incorporated into the Values Framework, the Framework is built to utilise the datasets and understanding that already exists within the organisation.

However, there is always a limit to the degree of knowledge that can be gathered within a rapid assessment. Limited consultation was possible with the broad range of specialist experts (including curators, building surveyors, archaeologists, finance and fundraising staff) that are employed by the Trust, and who would contribute specific knowledge to individual Indicators. There is potential to expand this in the future, particularly utilising the Workshop format that has been developed to support additional consultation.

It is also recognised that this process was co-ordinated by a single individual. While the focus was on using datasets where available, an element of subjectivity, even if unconscious, particularly for indicators for which less raw data is currently available, is inevitable. Subjectivity would be reduced with increased consultation, although it is recognised that those consulted will also bring their own understandings and perspectives on sites to the Values Framework.

It is also recognised that eight case studies, across seven sites, were completed during the Rapid Assessment process. As the case studies were compiled by an individual external to the Trust there

was inevitably a more limited understanding of all the sites within the Portfolio than an individual would have who worked internally to the organisation. While sense-checking occurred between the case study sites, it is recognised that this more limited perspective on the Portfolio as a whole may impact some of the assessments. Should a broader range of site/assets be subjected to the Values Framework further sense-checking would be recommended.

It should also be recognised that restrictions and guidance linked to the COVID-19 pandemic ensured that the exercise was desk-based.

Two slightly different methods for the completion of Frameworks were trialled based on site capacity.

In one method, broader organisational information was used to co-ordinate questions, focused around the Values Framework, for engagement with site-staff. A completed assessment was then made.

The second method used broader organisational information to develop a completed Values Framework assessment; and it was this that was specifically used during engagement with site staff.

Site-staff engaged through either method were provided with an overview of the developing Toolkit when initial contact was made, and were offered the opportunity to comment on a more finalised draft of the Values Framework.

Both methods offered scope for focused discussion and challenge where appropriate, and it is not considered that the information gathered differed significantly between the two methods pursued. However, the latter option, with increased focus on the completed Values Framework assessment, is considered to be more time-effective.

Capturing Information for Indicators

During the course of the case studies a number of indicator specific reflections occurred. Where relevant these have been factored into indicator definitions and parameters within the Portfolio Review Report, and the INSIGHTS: Framework document. More detailed reflections are included below:

Making use of current information: A principal of the rapid assessment toolkit was to utilise the significant amount of information that the Trust already holds about sites. However, this can lead to some restrictions and potential for inconsistencies within Indicators.

- **Quality/Quantity of source data** i.e. *Observations based on Visitor Surveys (included within Wellbeing, Accessibility and, to a lesser extent, Learning Value) can be limited by the scale of surveys received for sites. This can vary significantly depending on the site (and on the year) and impacts the quality of observations that can be made.*
- **Impact of COVID-19 pandemic:** *It is recognised that some of the information used was gathered during the COVID-19 pandemic (Visitor Survey replies for 2020 and 2021) while other sources (Social and Economic Assessment Report) utilised pre-pandemic information (2019/20) to negate this impact.*
- **Potential for inconsistency within information gathered for Indicators:** *Indicators are intended to be informed by a variety of data and information. Some of these are easy to gather, with comparable information across the organisation, whilst others are more challenging. Learning Value, for example, looks to gather information on the formal and informal learning value of sites. Stating whether a site has an existing education programme is straightforward, but assessing the quality of interpretation across sites can be more subjective. While aiming to represent a holistic picture of the site, current assessments have focused on inputs with cross-organisational input. It is intended that this approach would allow for increased comparisons between sites.*

- **Incorporating work specifically commissioned for sites:** *Some sites have work that has been specifically commissioned for that site, and which have proved particularly valuable to inform specific indicators. These included the Social Value Toolkit which was trialled at Newhailes,¹² 'Culloden 300: Living with the Battlefield', which focused on understanding the emotional connection visitors have to Culloden,¹³ and the site-specific economic benefit report commissioned for Fyvie.¹⁴ These documents have been taken into account, and noted, where relevant. However, this does ensure that indicators within these case studies are informed by a more detailed knowledge base than is currently available for other sites.*

If there was not deemed to be a sufficient degree of information available to make a judgement about a particular indicator it was left blank.

Accounting for New Information

Case studies capture the information that was available at the time of completion in February and March 2022. New information or insight, both internally and within the broader sector, particularly related to 'Wellbeing' and 'Contribution to Net-zero', will potentially impact an indicator's assessment in the future, and the Framework can be revised accordingly.

Balancing assets within a site

Within a site, there is a need to acknowledge that individual assets can deviate from the general assessment of a site as a whole. A particular asset, for example, might be deemed particularly rare in a site in which other assets are more common, or one asset might be in a poor condition in a site that is broadly considered to be in good condition. Where this has been deemed to be the case, it has been taken into account and acknowledged. It is recognised that there is an element of subjectivity regarding the emphasis that is placed on the individual asset, although a greater impact has been noted if the exception impacts what is deemed to be the principal asset of a site.

Double Counting

Double counting should be minimised wherever possible. For some case studies this involved a judgement call regarding which indicator information should be assigned to; providing local employment could be considered as a community offer. However, as this information had a more significant impact in shaping economic benefit it was captured under this indicator. The detailed information captured in the pilot case studies support consistency in this process.

There are also rare occasions in which double counting is inevitable. The most notable example of this is for sites that are primarily 'At Risk' because of their poor condition. Where this overlap has occurred in Case Studies it has been noted for future reference.

Proportionality

The Framework may be utilised across assets and sites of significantly varying scale and use. This needs to be acknowledged, particularly for indicators for which this has a direct impact such as 'Contribution to Net-zero.'

Lack of consensus

Differences of opinion may arise over any particular segment or asset. These should be acknowledged, and a record should be maintained of areas in which there was a lack of consensus for future reference.

Capturing Potential

Information shared about the site can often include discussion of future plans for the site. These should not be taken into account when assessing indicators **unless** the purpose of the exercise is to assess the future potential of an investment. Within the Case Studies some future plans have been captured in footnotes (where relevant) to demonstrate intent, or operational focus, but have not been factored into assessments.

Situating sites within their broader context

While the Trust has significant information about the sites within its care, it can be more challenging to situate sites in a broader context for which information is not controlled by the Trust. It can be challenging, for example, to understand a site's rarity in the national context, particularly in the context of a rapid assessment. Unless manageable, and specific information is available (as is the case for Battlefields or National Nature Reserves).

Similarly, it can be challenging to understand the economic impact of a site without additional external information linked to motivation for visiting the area, and the ability to situate Trust's sites within an understanding of the broader offer of their locality.

Asset or Indicator – Landscape

The landscape of sites is vital to the Trust, with sites operating at the intersection of cultural-heritage and nature. It is recognised that Landscape can be value in its own right, but is also an asset type, albeit one that can bring together other assets including natural heritage, built heritage, designed landscapes, and archaeological sites.

As an asset type, *landscape* can demonstrate multiple values, ranging from cultural significance, or wellbeing, to at risk. These have been incorporated, as relevant, into the specific indicators for a site as a whole.

Using the Framework in the Future

Building upon the learnings from the pilot case study process, a recommended approach to utilising the Framework in the future has been developed. This combines a desk-based application of data-sets (as was conducted during pilot case studies) with a workshop format that looks to draw on Trust expertise and experience that might not be captured within datasets.

A Toolkit for the Desk Based approach, derived from that used in the Rapid Assessment process, and a Workshop Support Document are provided within the *INSIGHTS: Framework* document.

APPLYING THE FRAMEWORK TO AN ASSET / SITE

Rapid Assessment Process	Recommended Approach (Portfolio wide assessment)
As carried out as part of this review.	See Toolkit in INSIGHTS: Framework paper for more detailed understanding
Consider if this is the first values framework assessment – if so, consider current situation (including already agreed future works).	Consider if this is the first framework assessment – if so, consider current situation (including already agreed future works) NOT potential. Potential can be noted and then assessed individually at a later stage.
Preliminary: Desk Based application of data sets to values – factual <i>+ Gathers information quickly at scale.</i> Assess information gaps	Preliminary: Desk Based application of data sets to values – factual Assess information gaps
Site/Area operations staff Provides information and views to enhance Rapid desk-based assessment. Provided context and current activity.	Site/Asset Workshop/s Engaging teams across the site, or those working with the asset, to both give views on data gaps (where they occur) and enhance initial assessment, taking into account both experience and expertise which may not be captured by any specific data sets. Provides detailed context and current activity.
Feedback Once completed -seek feedback from those interviewed, and Trust senior team member/s.	Seek additional views If an area of disparity/contention – this may be across a knowledge area or geographic area. Take a pragmatic and proportionate approach.
Comparison By researcher, across completed case studies to assist with consistency of approach.	Overview/Comparison Considered by appropriate Trust senior manager/s to ensure consistency of approach.
	Review and Re-examination Should significant change occur to asset or site.

ALIGNING MANAGEMENT OPTIONS WITH VALUES

The number of management options which the Trust can explore are significant and exploring what can be the most appropriate option for any given site or asset can be challenging. These are discussed in more detail within the *Built Estate Analysis report* provided as part of the Portfolio Review.

Aligning these options with the developed Values Framework provides clear context for any discussion. Pilot Case Studies demonstrate that the Framework can be utilised to focus understanding about current sites. However, it was also highlighted that the Framework can be used to understand the potential, or focus on the desired benefits, if changes were made to a site or asset.

The table below gives a visualisation of whether pursuing a management option at a site might have the potential to enhance, or detract, against specific Values that the site provides.

This is provided only as an indication; it is recognised that in reality there would be significant variation depending on the specific context of the site. It is also recognised that because there is not a 'standard' or typical Trust site, a baseline cannot be set. Therefore at this stage, the Table indicates potential. The Table should also be viewed in the context of an understanding of the scale of the impact, when pursuing different management options.

The below table gives an indicative overview of the potential to increase (and decrease) indicators across the Values Framework by implementing certain management types. This is an initial assessment which intends to demonstrate the breadth of impact different options may bring.



MANAGEMENT OPTION	CONSERVATION							ENGAGEMENT						SUSTAINABILITY				
	Cultural Significance	Integrity	Rarity	Inter-connected Place	At Risk	Condition	Biodiversity & Geodiversity	Knowledge Value	Well-being	Community Offer	Accessibility	Learning Value	Adaptability	Partnerships	Financial Sustainability	Growing Support	Economic Benefit	Contribution to Net-Zero
Commercial Let Estate								●	●	●	●	●	●	●	●	●	●	
Let Estate for the Fulfilment of the Trust's charitable purpose										●	●	●	●	●		●		
Private Management Agreement										●	●	●		●		●		
Trust as Tenant					●	●	●	●	●	●	●	●		●	●	●	●	
Guardianship Agreement ¹												●	●		●			
Conservation Agreement <i>• Site Previously Trust owned</i>		●	●	●				●	●	●	●	●	●	●	●	●	●	
Conservation Agreement <i>• Site Never Trust Owned</i>					●		●	●				●	●		●			●
Site-specific Adaption <i>• Re-interpretation</i>								●	●	●	●	●	●	●	●	●		
<i>• Adaption of space within an Asset</i>		●				●	●	●	●	●	●	●		●				
<i>• Adaption of whole asset</i>		●				●	●	●	●	●	●	●		●	●			●
Community Partnerships <i>• Activity and Group Specific Engagement</i>						●			●	●	●	●		●		●		
<i>• Use Partnerships</i>								●	●	●	●	●	●	●		●	●	
<i>• Local Management/ Vision Plan</i>				●			●			●	●			●		●	●	
Audience Specific Leases <i>• Community Leases</i>										●				●		●		
<i>• Repairing Lease to Private Individuals²</i>				●	●	●				●	●	●	●	●	●	●	●	
Partnerships with other heritage organisations <i>• Partnerships for proximity</i>				●			●			●	●		●	●		●		●
<i>• Partnership for Interest</i>								●		●	●	●		●	●	●		
Affiliate Schemes														●	●	●		
Move outside Portfolio		●		●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Manage Decay	●	●				●	●			●	●	●	●	●	●	●	●	

● Potential to increase

● Potential to decrease

1 HES will have similar, although not identical priorities for Guardianship sites.

2 In the past this has been challenging particularly due to restrictions in residential leasing law.

PILOT CASE STUDIES

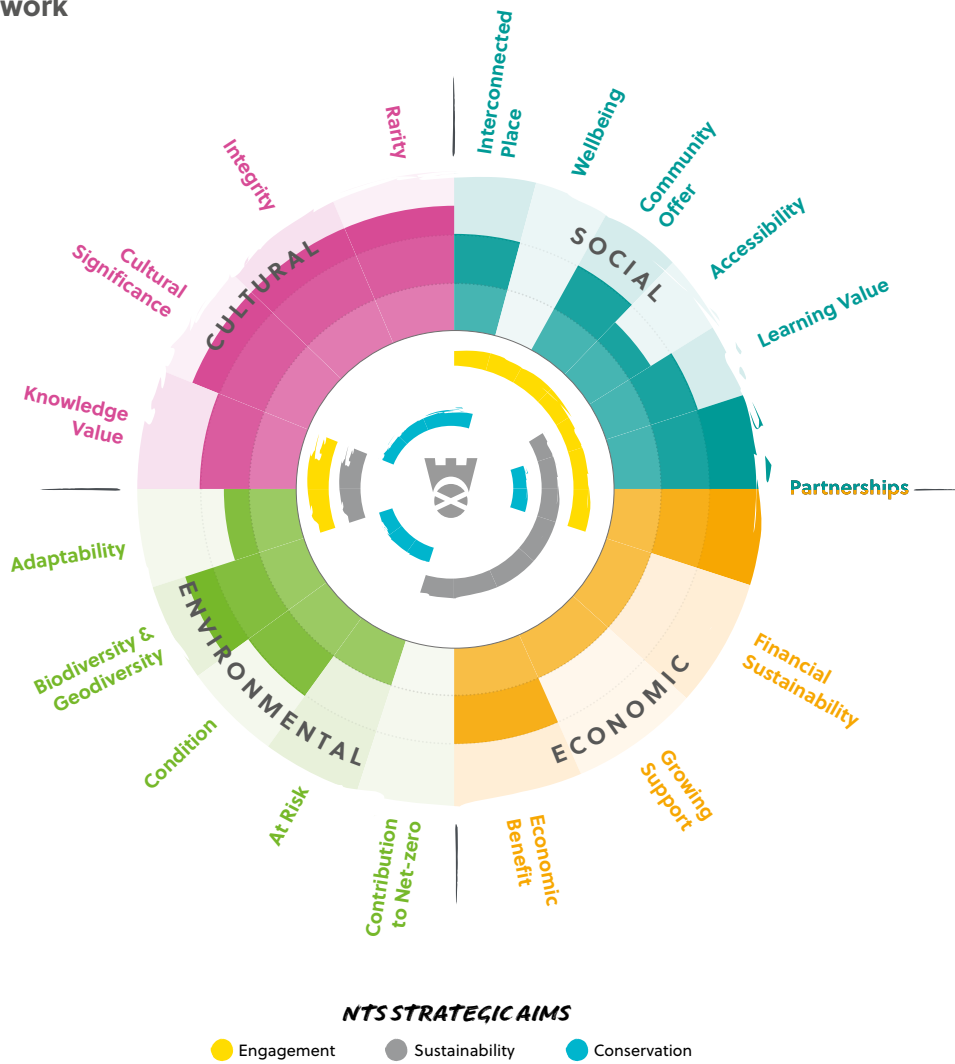
BALMACARA

Overview

Site:	Balmacara Estate
Acquisition Date:	Assorted from 1946/7 - 1990
Declared Inalienable:	Yes
Designation (s):	<ul style="list-style-type: none"> • 1 x Scheduled Monument: Plockton Open Air church • B Listed Building: The Steadings, Balmacara Square • 1 x C Listed Building: Kirkton of Lochalsh, Barn • 1 x IGDL: Lochalsh Woodland Walks (Work of Art: High, Historical: Some, Horticultural/Arboricultural/Silvicultural: Outstanding, Architectural: Some, Scenic: Outstanding, Nature Conservation: High, Archaeological: High, Archaeological: Little) • 2 x SSSI: Coille Mhòr & Ard Hill • 1 x Special Area of Conservation: Coille Mhòr • 1 x Geological Conservation Review Site: Ard Hill • 1 x Biosphere: Wester Ross • 1 x Conservation Area: Plockton • 1 x Local Landscape Designation • Overlooks Marine Area that includes 2 x Special Areas of Conservation, 1 x Marine Protected Area, 1 x Marine Conservation Area
Total Area of the Site:	c. 2,500 Hectares
Significance Rating in 2012 Review:	Considerable
Site overview:	Balmacara is a large and varied Trust site, encompassing a range of habitats, and focused on maintaining and supporting traditional Highland crofting practice. The site has a relatively large rural population and working with the community as a landlord shapes the Trust's role on the Estate.



Values Framework



Summary Record of Workings for Framework

Cultural

Segment & Rating	Findings
Knowledge Value: Medium	There has been significant surveying of, and research into, some aspects of the site, including the landscape, the archaeology, and the woodland. Maps and archives of the site allow the tracking of the area’s population from the early nineteenth century, while the mapping of modern crofting activity supports developing knowledge of the practice, particularly the inter-relation with wildlife conservation. There has been some monitoring of biodiversity at the site.
Cultural Significance: Medium/High	The Estate is significant as an example of an active crofting landscape. While the site has been used for millennia, and some of the buildings and archaeological sites in the area are of individual significance (as noted through Designations), the primary cultural significance of the site focuses on the importance of maintaining traditional Highland crofting practice within the wider landscape of the site.

Cultural (continued)

Segment & Rating	Findings
Integrity: Medium/High	At Balmacara it is recognised that the landscape will evolve and change to respond to local need. However, Integrity can be judged at this site to encompass an integrity of activity, namely of maintaining crofting practice, which continues across the site.
Rarity: Medium/High	The Trust does manage other sites that includes crofts such as Fair Isle, although the large resident population in Balmacara ensures it is relatively unusual for the Portfolio. Nationally, there has been a resurgence in interest in crofting practice, although Balmacara is rare for its level of active management, and it should also be noted that crofting townscapes can vary significantly across the country. It is also important to recognise that the Estate includes the Coille Mhòr woodland, which as part of Scotland's rainforest includes only 2% of Scotland's woodland cover. ¹⁵

Social

Segment & Rating	Findings
Interconnected Place: Medium	The varied landscape is essential to the significance of the Estate which overlooks a highly designated Marine Area, and includes a number of viewpoints over the surrounding area. Communication with landholders at the site's borders, such as the Forestry Commission, can be irregular but discussion takes place on relevant issues such as deer management.
Wellbeing: [High?]	<p>There is limited current evidence to qualify understandings of wellbeing at the site. There is very limited evidence from Visitor surveys, due to the nature of the site, and it is also recognised that the survey would not capture wellbeing in relation to the Estate's resident population.</p> <p>There is some evidence that a wellbeing rating for visitors to Balmacara would be high. Recreational activity is highly valued; the site is highly rated for mountain biking, and in recent community consultation exercises there was a desire for more paths suggesting that those already present support wellbeing and activity. The Trust has also partnered with the NHS in the past to develop wellness walks.</p>
Community Offer: Medium	<p>The Estate supports 27km waymarked paths and mountain biking trails which are widely utilised. Balmacara Square supports the Steading's Gallery, a café, delicatessen and gift shop. The Estate has also worked with the NHS and a local mental health charity to offer support for some within the community.</p> <p>Supporting crofting, particularly through the Traditional Croft Management Scheme, provides a relatively unique offer to the local community although it is also recognised that crofters can have mixed opinions of the Trust.¹⁶</p>
Accessibility: Low/Medium	The Estate maintains a variety of waymarked paths but terrain can be challenging and would not be suitable for all abilities. Areas of the site can be accessed by public transport and there is free parking at selected car parks.

Social (continued)

Segment & Rating	Findings
Accessibility: Low/Medium (continued)	The site is currently on Facebook and posts relatively irregularly to a following of just under 2,000 followers. ¹⁷ However, the Trust website provides significant information about the variety of experiences possible across the Balmacara Estate.
Learning Value: Medium	<p>The Estate runs a very popular crofting training programme with the local secondary school which focuses on practical skill. The course is consistently over-subscribed and is limited, due to staff capacity, from expanding further.</p> <p>There are interpretation panels at key sites around the Estate, as well as a Wildlife Spotter's Guide on the webpage. There are Visitor Centres at Plockton and Balmacara Square, which provide information about the estate and the local area.</p>

Socio-Economic

Segment & Rating	Findings
Partnerships: High	<p>It is recognised that there are individual relationships with the Estate tenants, a legal relationship with the eight grazing committees, as well as various levels of engagement with the three community councils. There is a strong relationship with local specialist groups, particularly the Plockton Historical Society, as well as the Plockton Harbour Association, and the Lochalsh Wildlife Watch Club.</p> <p>The Estate is also involved with partnerships external to the Estate and includes the Wester Ross Biosphere, the Scottish Crofting Federation, and the Alliance for Scotland's Rainforests.</p>

Economic

Segment & Rating	Findings
Financial Sustainability: Low	The site requires support from external subsidies, although there are funds within the site's Reserve Fund, this is, in part, as a result of the sale of assets that the Trust previously leased.
Growing Support: Low	Given the nature of the site, the Trust has a relatively low-level physical presence across the breadth of the site, and limited information is collected on visitors (i.e. via the Visitor Survey). The sale of Membership is not a focus for the site as there is minimal interaction between visitors and site staff. However, the site does play a role in advocating for traditional crofting. ¹⁸
Economic Benefit: Medium	<p>In the recent Social and Economic Impact Assessment Report, Balmacara was ranked 45/88 sites for its total GVA impact.¹⁹</p> <p>It is recognised that the Assessment Report focuses on visitor spend and employment, and does not take into account the impact of the Trust's support for crofting practice. It is however, also recognised, that crofting is not highly profitable, and Trust subsidies are focused primarily on delivering cultural and natural, rather than economic, benefits.</p>

Environmental

Segment & Rating	Findings
Contribution to Net-zero: ?	<p>A Natural Capital Assessment would be needed to contribute to this indicator within any accuracy. Areas of woodland on the Estate have increased in recent years.</p> <p>The NTS Natural Capital Executive Summary notes 6th highest Carbon storage topsoil in NTS estate, as well as carbon storage from peatland on the Estate. Site contributes to carbon sequestration of peatland and strongly for Carbon Sequestration of woodland. Small decree of carbon sequestration non-woodlands.</p> <p>A wood pellet boiler was trialled for Lochalsh House but was not pursued. Vehicles used by the Trust on the estate are diesel although two e-bikes are used on the estate for shorter journeys.</p>
At Risk: Low	<p>The primary risk to the current site would involve a lack of support for the crofting system in the face of wider socio-economic pressures.</p> <p>The 'At Risk' matrix developed by the Trust suggests that the site is not currently at significant risk from the impact of climate change, although there is the potential for significant slope failure in the future. It is also noted that the access road to the site might be impacted by rising sea levels.</p> <p>There has been significant work in recent years to mitigate the impact of invasive plant species through Project Wipeout.</p>
Condition: Medium	<p>The Traditional Croft Management Scheme supports the condition of crofting landscape and some monitoring has taken place, including a photographic assessment of common grazing over the last five years, which could be extended. However, the Trust is primarily only able to impact the condition of crofts through dialogue and persuasion. The buildings that are directly managed by the Trust are predominately in good or fair condition, and the condition of the woodland in the area is largely considered to be good, particularly after the work of Project Wipeout.</p>
Biodiversity & Geodiversity: Medium/High	<p>There are a wide diversity of habitats represented on the estate which, in turn, leads to a wide variety of wildlife and plant life, most notably in Coille Mhòr. There are some rare plant species contained within the Lochalsh Woodland Walks, previously the former Lochalsh Woodland Garden.</p>
Adaptability: Low/Medium	<p>While individual elements of the site can be adapted, Balmacara Square was for example previously a farm steading, the focus of the, admittedly large, Estate is likely to remain on supporting the crofting landscape. While this is the case there is a need to ensure that any adaptations or change of use for the site also recognise the impact on the wider estate community.</p>

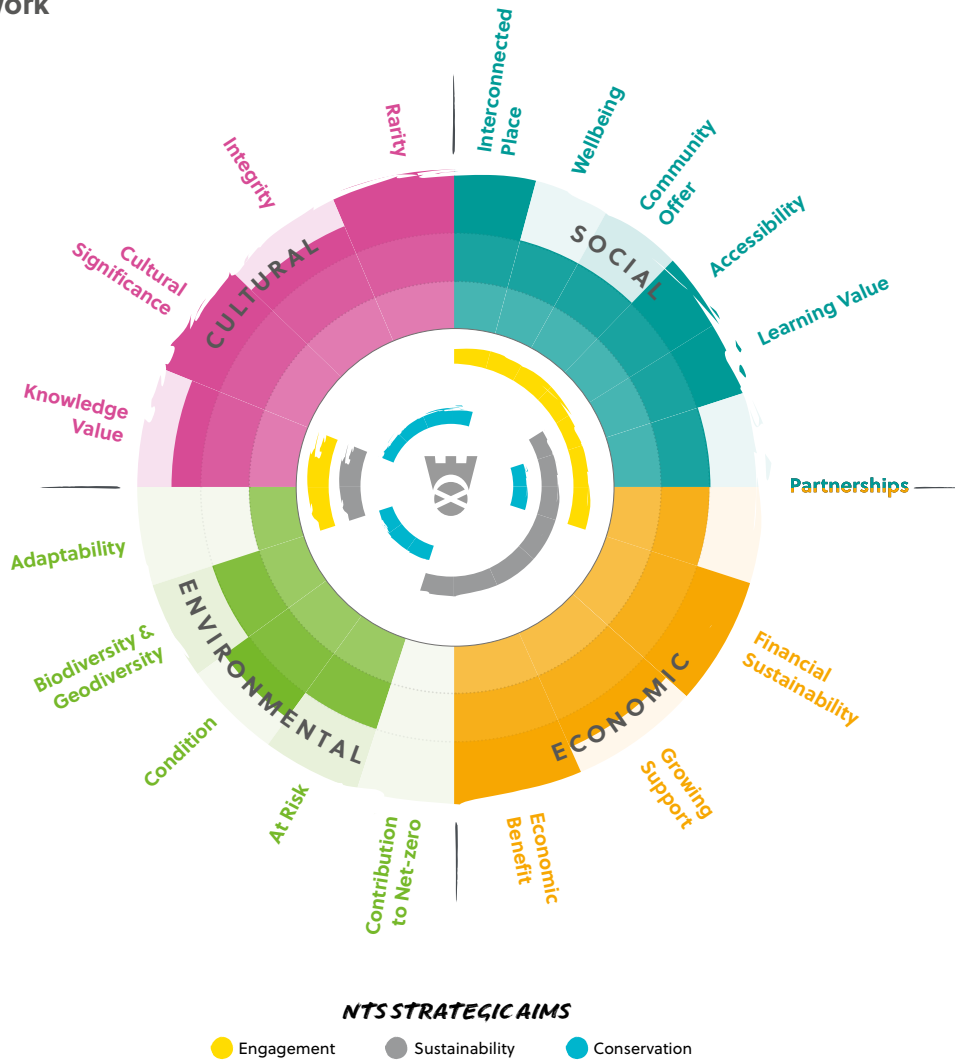
CULLODEN

Overview

Site:	Culloden
Acquisition Date:	Initial land grant 1937. Additional acquisitions made 1944-1998.
Inalienable:	All acquisitions declared inalienable
Designation (s):	<ul style="list-style-type: none"> • 1 x Scheduled Monument (comprises three elements: Graves of the Clans, Memorial Cairn and Well of the Dead) • 2 x B Listed Building: Old Leanach Farmhouse, King's Stable Cottage • 1 x Inventory of Historic Battlefields: Battle of Culloden • 1 x Conservation Area: Culloden Moor
Total Area of the Site:	70.2 Hectares
Significance Rating in 2012 Review:	Exceptional
Site overview:	Culloden is the site of the battle of Culloden, the last pitched battle in Britain fought between Government and Jacobite troops in 1746. The site provides a space to learn about and memorialise the battle, as well as considering the impact it had on Highland and Scottish society. The site under the care of the Trust is considered to cover between one third and one half of the whole battlefield.



Values Framework



Summary Record of Workings for Framework

Cultural

Segment & Rating	Findings
Knowledge Value: Medium/High	<p>The site has, and is, significantly contributing to knowledge of the battle of Culloden. Developing research has looked to marry archaeological and historical knowledge to deepen understanding of the battle. Whilst there is no collective archive for the site, there is significant academic research that the site can draw upon, such as the 'Officers of the Jacobite Armies' project based at the University of Glasgow.²⁰</p> <p>However, the site does not cover all of the battlefield. This places limitations on the knowledge that can be gained from the site, and is the primary reason why the property has not been rated 'High' for this Indicator.²¹</p> <p>Some work has been done into understanding the site outwith the battle, with evidence of occupation dating back to the Neolithic period, although it is recognised that this is not the primary focus of the site.</p>

Cultural (continued)

Segment & Rating	Findings
Cultural Significance: High	Particularly as a commemorative and associative site, the landscape of Culloden is considered to have a strong cultural significance. The personal nature of this connection for visitors to the site was highlighted in the report, 'Culloden 300: Living with the Battlefield' (2020).
Integrity: Medium/High	Culloden presents an interesting case for this indicator. Work has been done to restore the landscape of the site to what is known of the 1746 setting, although it is noted that elements of the site, such as the Memorial Cairn, which post-date the battle, are also essential to the understanding of, and connection to, the site. It is the perception of integrity at Culloden that is vital to the site's sense of place.
Rarity: High	<p>Similar to 'Integrity', Culloden presents an interesting case for this indicator. The Trust owns all, or part of seven other battlefields and, as of February 2022, there are 39 other Scottish battlefields on the Inventory of Historic Battlefields, although a more limited number are related to the Jacobite uprisings.²² However, it is also recognised that the battle of Culloden is a specific event, which Trust research indicates has strong emotional resonance with modern audiences, and few of the other battlefields on the Inventory of Historic Battlefields present the same opportunity for public engagement.</p> <p>The individual assets on the site would not be defined by their rarity, and it is likely that if the associative rarity of the site as a whole was not taken into account, Culloden would score lower in this indicator.</p>

Social

Segment & Rating	Findings
Interconnected Place: High	The current Trust site includes between one third and one half of the original site of the battlefield. Recognising this highlights the extent to which the site is interconnected with the surrounding environment. Views from the site, notably from the roof of the visitor centre, are integral to situating the battle within its wider landscape.
Wellbeing: Medium	<p>There is significant work being undertaken within the Trust to develop how understandings of Wellbeing might be measured. The results of visitor surveys taken by the Trust between 2019-2021 indicate that approximately 10.5% of those surveyed said they felt healthier as a result of their visit, 34% felt happier, and 42% felt more relaxed. Each of these totals falls below the organisational average across the three years, although the site does score above average for encouraging a sense of pride in Scotland.²³</p> <p>However, indicators from 'Culloden 300: Living with the Battlefield' (2020) suggest that the site has a significant emotional response for visitors. This emotional response may not always relate directly to the Trust's definition of 'wellbeing'. For example, 16% of respondents to the report's survey specifically noted the peacefulness of the battlefield, for example. The outdoor nature of the battlefield would also need to be factored into understandings of wellbeing at the site, as it is recognised that the site is also used as a green space by the local community.</p>

Social (continued)

Segment & Rating	Findings
Community Offer: Medium	The site offers a range of facilities which communities can use. These include the visitor centre, which includes an exhibition area, a café, and the potential for venue hire, as well the site's location on the wider Culloden path network. The site also offers a memorial space for descendants of those who fought at Culloden, most prominent on the anniversary of the battle.
Accessibility: High	<p>The battlefield is always accessible, and the visitor centre is closed only for a three week period at Christmas and New Year. The site has good transport links and is accessible by public transport. There is level access throughout the site, and powered scooters can be borrowed to tour the battlefield. There is a GPS triggered audio guide, a hearing loop throughout the visitor centre, and display information is available in audio and large print.</p> <p>The site has a developed digital presence across a range of social media platforms and a significant number of followers. The Trust website also links to a number of site-specific articles, a Wordpress account containing multiple articles focused around the site, four films created for an online event commemorating the 275th anniversary of the battle of Culloden, and a five-part podcast series. The Trust website is also available in Gaelic. Pilot tests are taking place for digital tours.</p> <p>Visitor surveys suggest that the site does not attract a particularly diverse audience, and answers broadly matched the Trust's average for respective years.²⁴</p>
Learning Value: High	Culloden has the largest school programme in the Trust, and the site has been developed to encourage learning through a range of methods. The results of visitor surveys taken by the Trust between 2019-2021 indicate that visitors feel the site ensures they are more knowledgeable about the site, and Scotland's heritage. Totals are significantly above the organisational average for these years. ²⁵

Socio-Economic

Segment & Rating	Findings
Partnerships: Medium	Current partnerships noted include the Gaelic Society of Inverness, and the Inverness Astronomical Society who rent the observatory on the site. The site also works with organisations, such as Visit Scotland, to support and engage with the regional tourism offer.

Economic

Segment & Rating	Findings
Financial Sustainability: High	Culloden has been the strongest financial performer in the Trust's portfolio.
Growing Support: Medium/High	<p>With its high visitor numbers (5th highest in the Trust in 2019) and strong emotional engagement, the site has a high profile within the Trust. The site has acted as an advocate for battlefield conservation.</p> <p>The site has a relatively low membership conversion rate, largely because of high international visitor rates.²⁶ The site benefits from a specific Fundraising campaign, 'Culloden's Fighting Fund'.</p>
Economic Benefit: High	The Social and Economic Impact Assessment Report (2021) indicated that in 2019/20, Culloden had the fifth highest total GVA Impact of all visited Trust sites. The site ranked as the highest site in the Trust for 'Overnight Visitors – paying' and sixth for 'Overnight visitors – non-paying' providing an indication of spend outwith the site.

Environmental

Segment & Rating	Findings
Contribution to Net-zero: -	<p>The site is primarily peat bog, and the restoration of the battlefield to its 1746 appearance has included the 'rebogging' of the area. A natural capital assessment of the site would provide further information about the benefit of this for carbon storage.</p> <p>The Executive Summary for the NTS Natural Capital Assessment notes Carbon Storage from peatland occurs on site as well as carbon sequestration from woodlands.</p> <p>The site has electrified machinery and has a wood-chip boiler at the site. There is an electric vehicle charging point in the car park.</p>
At Risk: Medium	<p>Culloden provides an interesting case study for this indicator. The site is threatened to a considerable extent by the possibility of development to the surrounding area, and significant work has been done to highlight this risk including the publication of 'Culloden 300: Living with the Battlefield' (2020). It is recognised that the development in question would have a significant and direct impact on the site, but does not constitute a direct threat to the fabric of the site itself.</p> <p>The 'At Risk' matrix, developed to highlight a site's vulnerability to the changing climate, suggests that currently Culloden is not a significant risk property although there is the potential in the future for slope failure to significantly impact the property.</p>
Condition: Medium/High	The site as a whole is considered to be in good condition. The built assets on site include two sites rated good (Monument, Leanach Cottage), one site rated fair (Visitor Centre) and one site rated poor (Kings Stables). The site has recently been awarded Museum Accreditation status, indicating that the site's museum collection is maintained to a nationally understood standard.

Environmental (continued)

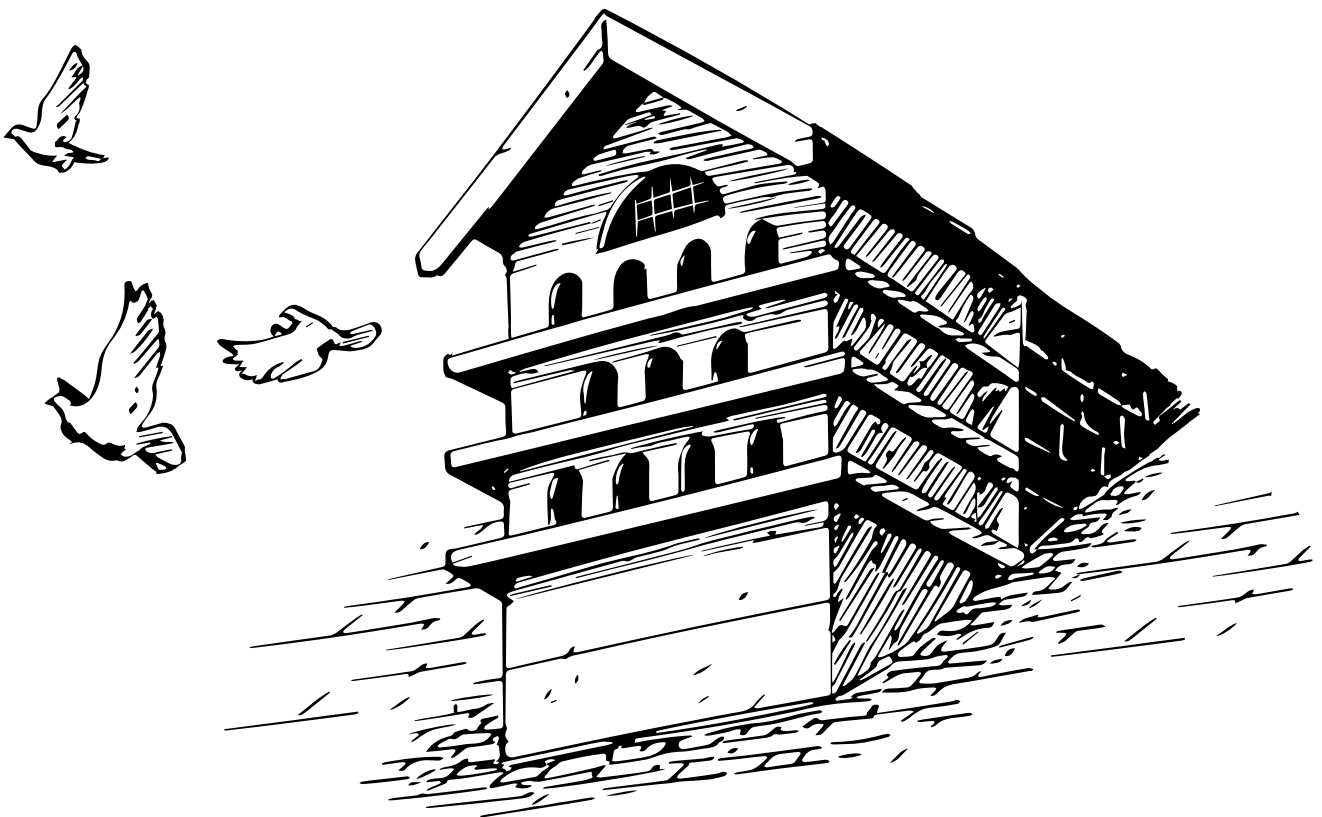
Segment & Rating	Findings
Biodiversity & Geodiversity: Medium	The site supports a variety of wildlife, including notable birds such as skylarks and red kites, and plant species including a number of rare orchid species. However, the primary purpose of the site, while giving full consideration to biodiversity, is to present the battlefield as it was in 1746.
Adaptability: Low	While individual assets on the site have the potential to be adapted or re-interpreted, the site itself has a very specific focus and additional adaption of the site would be likely to have a negative impact on the memorial nature of the site.

FINAVON DOOCOT

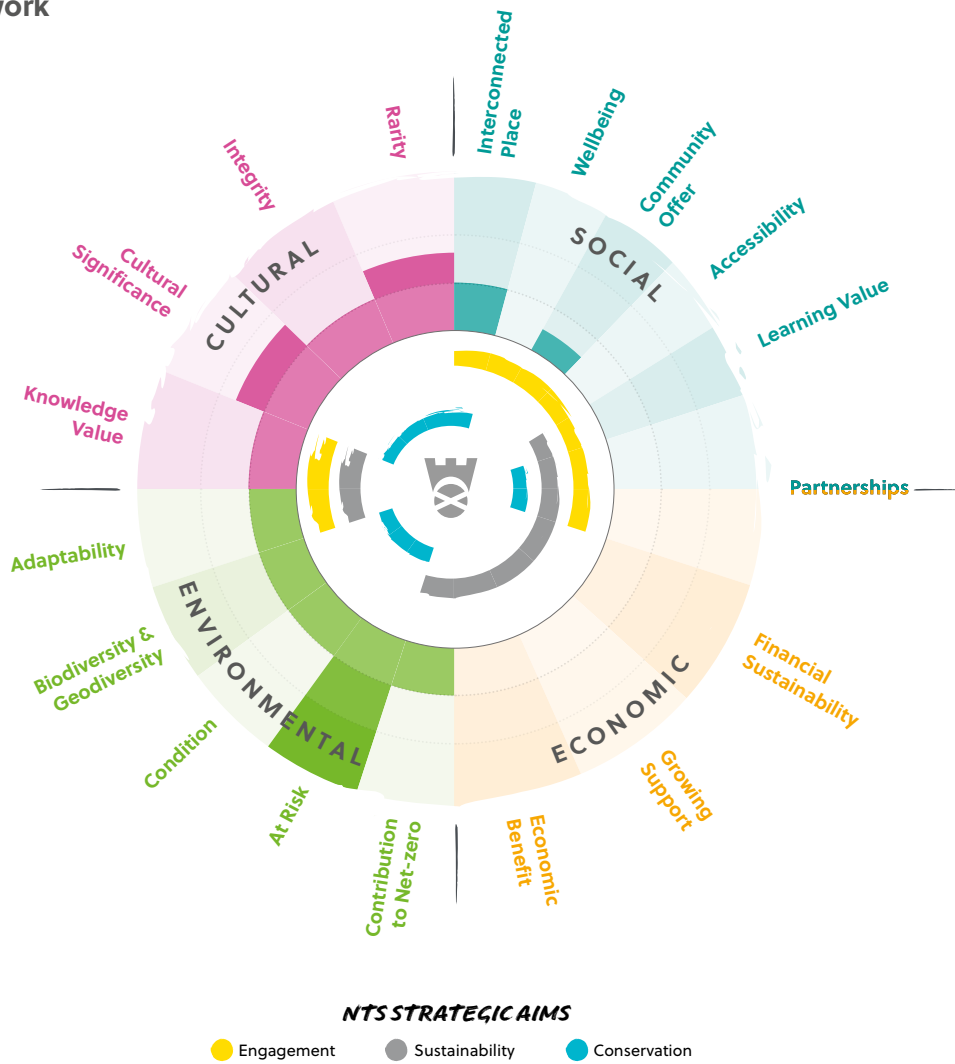
Overview

Site:	Finavon Doocot
Acquisition Date:	Doocot Acquired 1992, Land & Servitude 1993
Declared Inalienable:	No
Designation:	<ul style="list-style-type: none"> • Category B Listed Building
Total Area of the Site:	0.056 Hectares
Significance Rating in 2012 Review:	Not Reviewed

Site overview: Finavon Doocot is the largest surviving Doocot in Scotland and is dated variously to the sixteenth, seventeenth, and, even occasionally, the eighteenth centuries. There was significant repair to the building in the 1970s. The site is currently in poor condition and is not accessible to the public. Funding has been allocated to stabilise the property and to consider the future of the site.



Values Framework



Summary Record of Workings for Framework

Cultural

Segment & Rating	Findings
Knowledge Value: Low	Despite research, it is challenging to pin down the historical development of the Doocot, and further investigation is hampered by the restoration work completed in the late 1970s. The site can, and has, been discussed in relation to other Doocots in Scotland.
Cultural Significance: Low/Medium	Finavon Doocot is the largest doocot in Scotland and a good example of a lectern doocot. The architecture is of regional importance, demonstrating a style typical of Angus. Due to the lack of clarity about the historical development of the Doocot only tentative associative links can be made to the owners of Finavon Castle.
Integrity: Low	The repairs in the 1970s replaced about a quarter of the building's original fabric and decisions were made based on cost rather than conservation. The most recent engineering assessment in 2019 suggested that the North wall, the final surviving authentic feature in the building, would be challenging to conserve.

Cultural (continued)

Segment & Rating	Findings
Rarity: Low/Medium	The Trust has eight other Doocots in the portfolio ,although Finavon Doocot is the largest. If the Doocot could be definitively dated to the sixteenth century it would also be an early surviving example of a lectern doocot. A search for 'Dovecot' in Canmore returned 947 results across Scotland (although additional investigation would be needed to confirm these all represented individual sites) of which 69 are in Angus. ²⁷ Research on the site was published in the 1970s as part of a collection entitled 'The Doocots of Angus'.

Social

Segment & Rating	Findings
Interconnected Place: Low	It is likely that the site was historically linked to the, now ruined, Finavon Castle. Landscape context for the site has been significantly limited by the development of the A90 while the repairs to the site in the 1970s included a new access road.
Wellbeing: None	No visitors can access the site, therefore no visitor survey information has been collected related to wellbeing. It is possible that having a visible site, in poor condition, may have a negative impact on those who pass by the site.
Community Offer: None/ Low	As the site is closed to the public there is no direct community offer. The nearest staffed property to the Doocot is House of Dun and there is therefore limited engagement with the community immediately surrounding the Doocot. In August 2021 there was significant graffiti activity at the site. It is recognised that there was a community who were committed to the preservation of the Doocot who passed the site into the care of the Trust to secure the long-term survival of the property. Any potential for continuation of this engagement is currently unclear.
Accessibility: None	Access to the site is currently not permitted. The site is included, along with other sites, on the Trust's 'Little Gem' webpage but the entry for the site is limited.
Learning Value: None	The site is currently closed and so there is no learning currently occurring at the site. Historically, the site contained an exhibition about the history of doocots in Scotland.

Socio-Economic

Segment & Rating	Findings
Partnerships: None	The site is not involved in any known partnerships.

Economic

Segment & Rating	Findings
Financial Sustainability: None	No income is gained from the property and expenditure is required to stabilise the building.
Growing Support: None	It is currently possible that the site, as a Building at Risk, may have a negative impact on the reputation of the Trust.
Economic Benefit: None	As no visitors can access the property the recognised economic benefit is currently non-existent.

Environmental

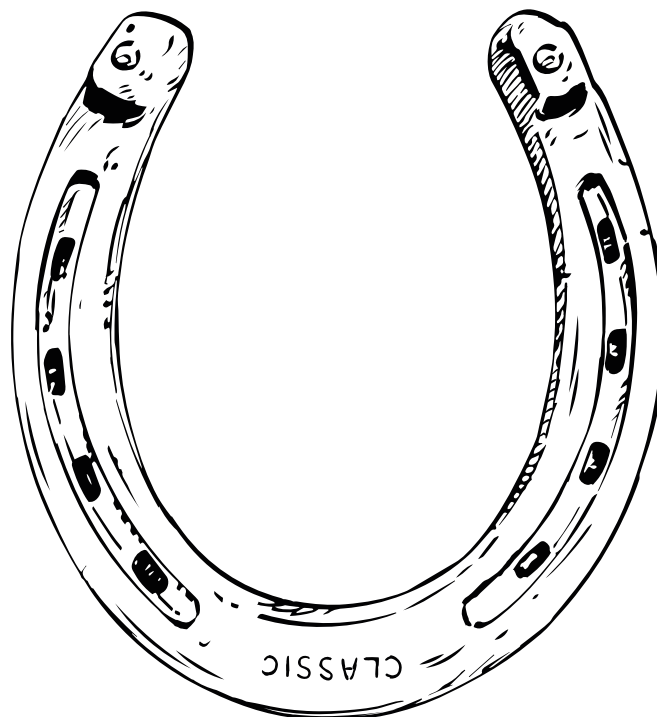
Segment & Rating	Findings
Contribution to Net-zero: Low	There is currently no energy output at the site. There is a small, vegetated area around the Doocot although as the total site is small there is also limited potential for carbon storage/sequestration.
At Risk: High	<p>The current primary risk to the site is recognised to relate to the condition of the site. While acknowledging this to be double counting (with Condition) it was considered important to highlight this, within this indicator.</p> <p>The site was not recorded within the 'At Risk' Matrix developed by the Trust so it is unclear whether the site is vulnerable to the impact of climate change.</p>
Condition: None/Low	The site is on the Buildings at Risk Register and is structurally unsound. Funding has been granted for the next two years to stabilise the property.
Biodiversity & Geodiversity: Low	The site is very small and supports limited biodiversity. There is no known geodiversity interest at the site.
Adaptability: Low	A number of suggestions have been made regarding adaptations to, or changes of use for, the Doocot. It is recognised that the site is small and is highly visible from the A90. It is also located on boggy ground and the current structural condition of the site inhibits immediate re-interpretation. ²⁸

FYVIE

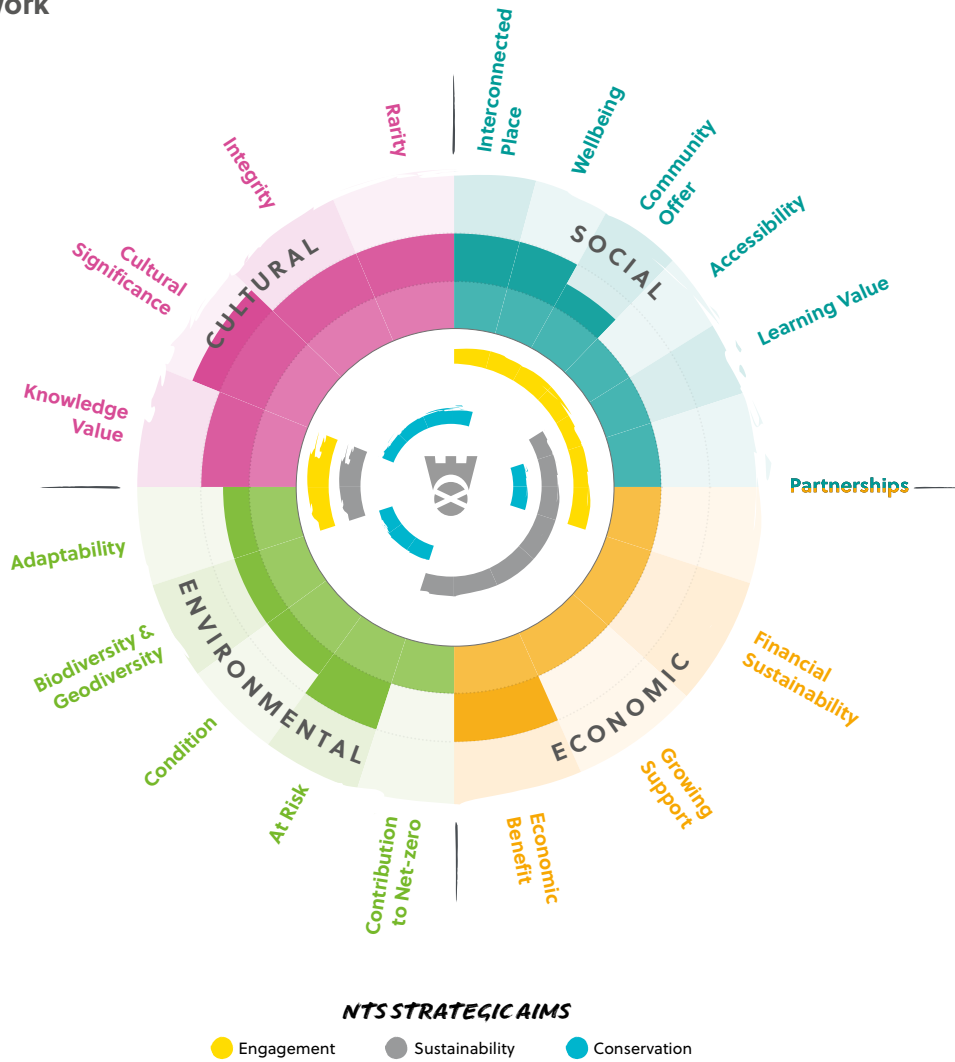
Overview

Site:	Fyvie Castle, Garden & Estate
Acquisition Date:	1984
Declared Inalienable:	Yes
Designation (s):	<ul style="list-style-type: none"> • 1 x A Listed Building: Fyvie Castle • 5 x B Listed Building: Fyvie Castle Boathouse, Ivy Bridge over River Ythan, Old Home Farm, Statue in Walled Garden, Racquets Court • 3 x C Listed Building: Disused Privy, Fyvie Castle South Gates, Walled Garden, Fyvie Castle • IGDL: Fyvie (Work of Art: Outstanding, Historical: High, Horticultural, Arboricultural & Silvicultural: Outstanding, Scenic: High, Nature Conservation: High, Archaeological: Outstanding) • Inventory Battlefield: Battle of Fyvie
Total Area of the Site:	49.57 Hectares
Significance Rating in 2012 Review:	Considerable
Site overview:	<p>Shaped over 800 years of history, Fyvie Castle contains a highly significant collection and is located within an eighteenth-century landscape and a walled garden containing the Garden of Scottish Fruits.</p>

It is recognised that there is discussion currently taking place to present a new Vision for Fyvie, focused on the need for conservation of the Castle structure, which is likely to impact the future direction of the property.



Values Framework



Summary Record of Workings for Framework

Cultural

Segment & Rating	Findings
Knowledge Value: Medium	Significant research has been conducted into the multi-layered story of Fyvie. The archives related primarily to the Forbes-Leith ownership of the property from the 1890s, is retained by the family. Any archive related to the site’s history prior to this, is primarily contained within the respective archives of the different families who owned the site, predominantly sited in the National Records of Scotland. ²⁹
Cultural Significance: Medium/High	The site has a long and varied history, visited by royalty but also intertwined with the intangible heritage of the area through folklore and songs. The architecture of the site, principally the South Front, is considered significant as is the collection, notably the portraits, contained within. The eighteenth-century designed landscape is noted for its artistic quality, there is extensive archaeological interest, notably in evidence of early gardens, and the entirety of the site is included within the Inventory of Battlefields for the Battle of Fyvie in 1644.

Cultural (continued)

Segment & Rating	Findings
Integrity: Medium	Fyvie Castle has been continually adapted over 700 years and has a complex structural history. The property was acquired in part to keep the collections (a mix of historic objects with significant nineteenth century additions) and castle, together. The designed landscape has not changed significantly since it was laid out in the eighteenth century.
Rarity: Medium	<p>Fyvie is located in the Trust's North-east region which has a number of other castle sites, although Fyvie is notable for its architectural scale, diverse and lengthy history, and American-influenced recreation buildings in the grounds.</p> <p>There are a number of rare items within the collection and in the archaeological evidence around the site. Fyvie is one of eight battlefields owned, or partly owned by the Trust, while the walled garden, dedicated to Scottish varieties of produce, is also notably unusual.</p>

Social

Segment & Rating	Findings
Interconnected Place: Medium	The site is flanked by the wider estate maintained by the Forbes-Leith family. The Home Farm is shared by the Trust and the local estate. The designation for the Garden and Designed Landscape extends beyond the Trust's boundaries.
Wellbeing: Medium	There is significant work being undertaken within the Trust to develop how understandings of Wellbeing might be measured. There is some information from Visitor Surveys for the site for 2019 and 2021 which indicates that a slightly higher than average number of visitors felt a lot happier or more relaxed, as a result of their visit to the site. ³⁰ Surveys also indicate that the site encourages a slightly higher than average number of visitors to feel a stronger connection to those they were with, the past and the Trust. ³¹ It is likely that additional research would support a clearer picture of the site.
Community Offer: None/ Low	The site offers space to walk, particularly around the Loch of Fyvie, and has a small tearoom. The site runs seasonal-specific, or annual events and is also used for functions, although this has been significantly impacted by the COVID-19 pandemic. The site is used by photographers, particularly of waterfowl. Produce is grown on the site in the Walled Garden, some of which is sold. There is holiday accommodation on site within Preston Tower.
Accessibility: Low	<p>There is limited accessibility to the site by public transport and the castle is not accessible to wheelchair users. There is no accessible toilet at the castle although there is within the walled garden. Paths around the site provide level access but many are gravel and not easily navigable.</p> <p>Results from the visitor survey in 2019, do not suggest that the site attracts a particularly diverse audience and answers broadly matched the Trust's average for that year.³²</p>

Social (continued)

Segment & Rating	Findings
Accessibility: Low (continued)	There are a limited number of additional photographs of the Castle and grounds on the website. The site is followed by nearly 8,000 people on Facebook has an Instagram profile with around 7,000 followers. Posts are relatively intermittent and focus on access and events. A virtual visit to Fyvie Castle and a more extensive walled garden tour have been created. ³³
Learning Value: Low	Within the Castle, the focus of interpretation is targeted at specialist audiences and there is limited interpretation around the grounds, although there is interpretation in the walled garden. There is no current education programme connected to the site.

Socio-Economic

Segment & Rating	Findings
Partnerships: Low	There are limited partnerships noted to be in place beyond those with travel companies encouraging visits to the site.

Economic

Segment & Rating	Findings
Financial Sustainability: Low	<p>The site operates at an operational deficit.</p> <p>There is some diversity of income streams, notably supported by the Holiday Accommodation in Preston Tower and the Functions and Events programme that has existed at the site.</p>
Growing Support: Low	<p>The site features in some regional promotion and has also been used to foster connections with the USA, given the historic connections of the site.</p> <p>Membership sales on site have been decreasing in recent years although it is recognised that this follows a wider trend towards online sale of membership. In both 2019 and 2021 (records not available for 2020) the site had a slightly higher proportion of surveyed visitors who were National Trust for Scotland members than the organisation's average.³⁴</p>
Economic Benefit: Medium	<p>The Social and Economic Assessment Report places Fyvie's total GVA impact as 31st out of 88 sites (£475,500) and the site's total jobs impact as joint 27th out of 88 (22 jobs).³⁵</p> <p>A site-specific Economic Impact Assessment Report was commissioned for the site in 2019 which calculated that in 2018/19 the site made an economic contribution of £1.5 million GVA and 68 jobs in the local area. If this total was placed within the context of the Trust-wide Social and Economic Assessment Report Fyvie would have the 16th highest GVA in the Trust.</p> <p>The site-specific report indicates far higher estimates across the board for the site (i.e. Direct Impact GVA of £252,000 in comparison to £97,400 in the Trust-wide Social and Economic Impact Assessment report).</p>

Economic (continued)

Segment & Rating	Findings
Economic Benefit: Medium (continued)	<p>Some of the information, notably that related to supply and procurement, might be more accurate as the Trust-wide Impact Assessment calculated site-specific procurement 'on a proportionate distribution.' The site-specific report also included information, particularly related to staff spend, which is not captured at an individual property basis for the Trust-wide report.</p> <p>For the purposes of this exercise, and the need to situate the site within the wider portfolio, the Indicator has been ascribed 'Medium' and errs towards the calculation of the Trust-wide Social and Economic Assessment report. It is noted that the site-specific information has the potential to present a more detailed understanding of the site's economic benefit but is more challenging to situate within the wider Portfolio.</p>

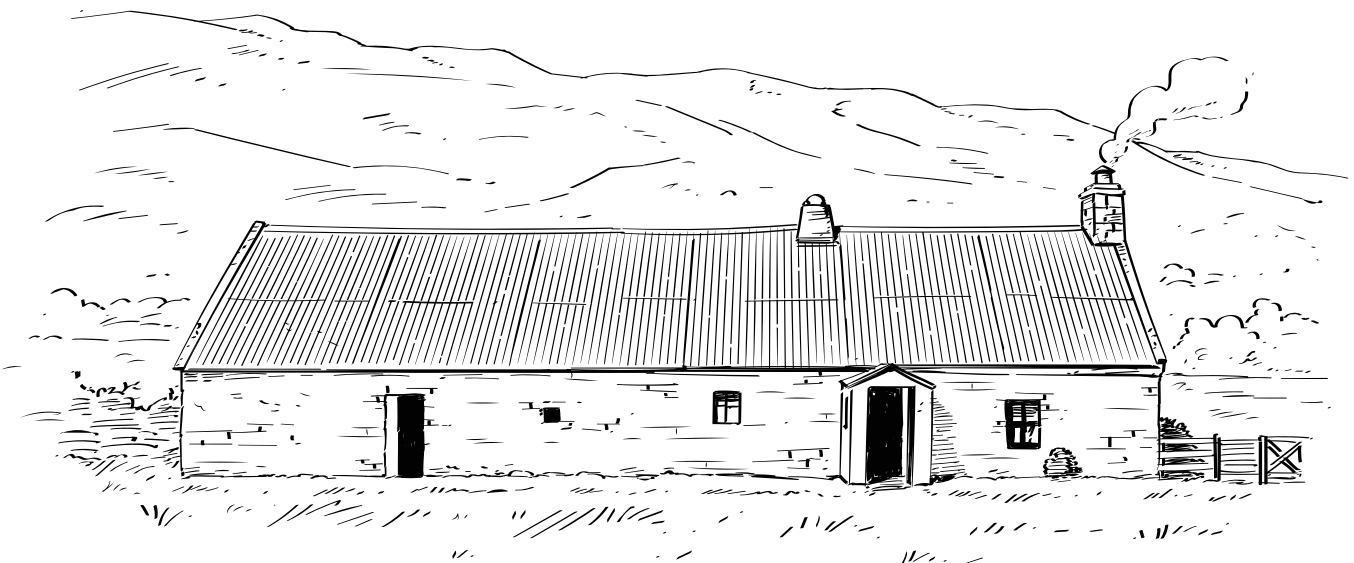
Environmental

Segment & Rating	Findings
Contribution to Net-zero: Low	<p>There will be some carbon storage through the designed landscape.</p> <p>The NTS Natural Capital Executive Summary did not flag carbon storage, suggesting it is minimal, although it did flag some carbon sequestration through woodland.</p> <p>However, the main castle is very challenging to insulate, and the building is heated by electricity with no energy generated on site.</p>
At Risk: Medium	<p>There are some structural concerns to the Castle, and a recognised need to invest in the wiring at the property.</p> <p>Internal assessments of the impact of climate change to the site do not suggest that Fyvie is at significant risk.</p>
Condition: Low/Medium	<p>Currently structural monitoring is taking place on the Meldrum and Seton towers. The Home Farm is on the Buildings at Risk register. The grounds are considered to be in reasonable condition, although the negative impact of recent storms (winter 2021/2) is noted.</p>
Biodiversity & Geodiversity: Low/Medium	<p>There are a small range of habitats on the site which support some notable species including red squirrels, bats, and winter waterfowl.</p>
Adaptability: Low/Medium	<p>There is the potential to increase or extend interpretation of the site. There are existing buildings on site, including the Home Farm, the Boathouse, and the Racquets Court, which have the potential to be adapted, particularly to enhance the visitor experience. However, it is recognised that this could require significant investment.</p>

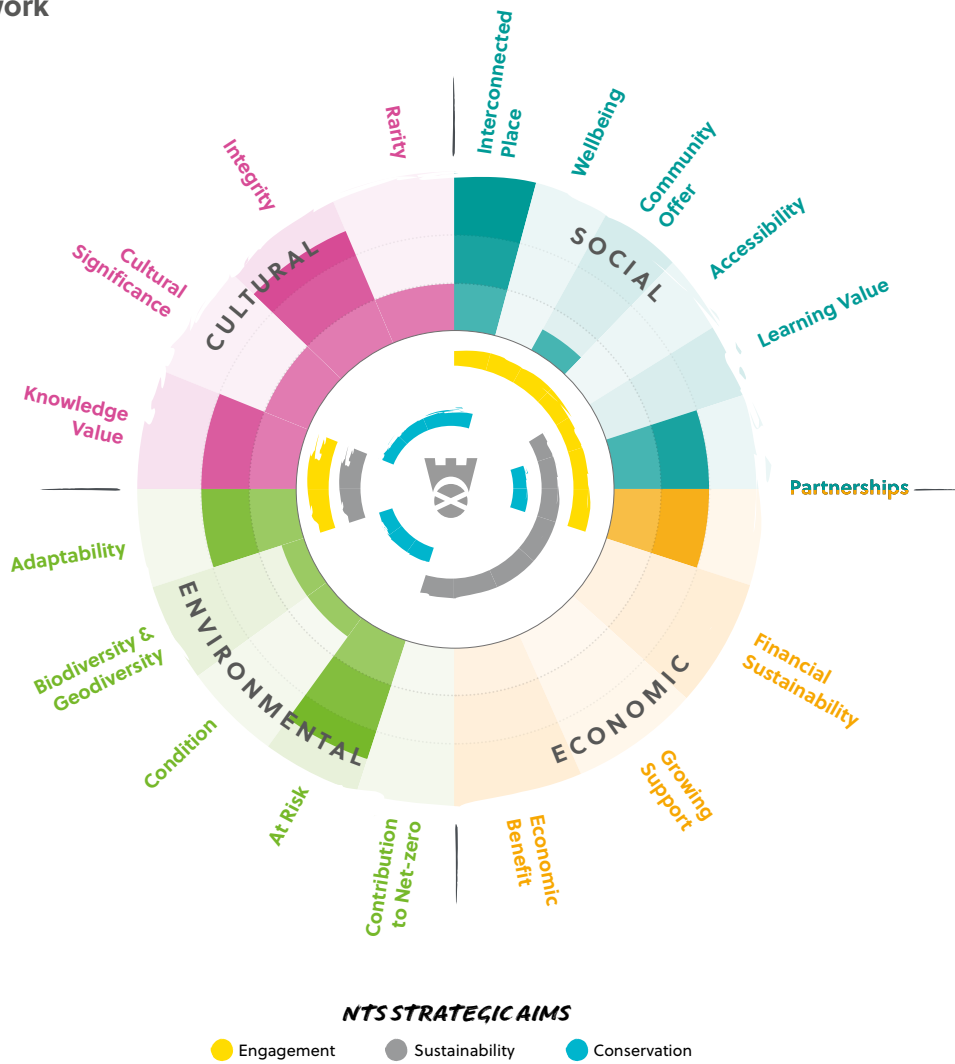
FYVIE OLD HOME FARM

Overview

Asset:	Old Home Farm and Outbuildings
Site:	Fyvie Castle, Garden & Estate
Acquisition Date:	Fyvie Castle, Garden and Estate was acquired by the Trust in 1984. The Home Farm is currently partially owned by the Trust and partly by Fyvie Estate Management.
Designation (s):	<ul style="list-style-type: none"> • B Listed Building • The asset sits within Fyvie's Garden and Designed Landscape designation as well as the Historic Battlefield Designation for the Battle of Fyvie
Asset overview:	<p>The Home Farm comprises a series of courtyards built in the late eighteenth and early nineteenth century. Historically, the asset would have been a hub for the Estate community.</p> <p>Approximately two-thirds of the asset are owned by the Trust. While much of the asset is not utilised, it does include residential accommodation for Trust staff and a Grain Dryer which is used by Fyvie Estate Management. Part of the asset also acts as the boundary wall of the Walled Garden.</p> <p>The remainder of the asset is owned by Fyvie Estate Management.</p>



Values Framework



Summary Record of Workings for Framework

Cultural

Segment & Rating	Findings
Knowledge Value: Medium	There is a surviving archive linked to the management of the Estate. Archives connected to the asset can provide a relatively comprehensive understanding of the functions of the asset.
Cultural Significance: Low	The site represents a good example of eighteenth and nineteenth century agricultural buildings. The site is a B Listed building and is included within designations for both the Gardens and Designed Landscape, and the Battlefield at Fyvie.
Integrity: Medium/High	It is recognised that the pattern of courtyards developed over a period of approximately fifty years in the late eighteenth and nineteenth century. The existing site includes some more recent alterations, primarily linked to developing function.
Rarity: Low	The site contains other examples of Home Farms, notably in larger estate sites such as Drum Castle, or Culzean. Situating the site within the national context is more challenging although it is likely that historic estates would have Home Farm buildings.

Social

Segment & Rating	Findings
Interconnected Place: High	While currently divorced from a visitor's primary understanding of the wider site, the asset provides a boundary wall for the Walled Garden. In recognition of this, the asset has been rated as high for this indicator.
Wellbeing: None	Barring the residential accommodation within the asset, there is very limited access to the asset. The Home Farm is not highly visible from the primary Trust visitor routes at the site, but a section of the Walled Garden is currently fenced off due to the condition of the Boundary Wall. This may currently negatively impact the wellbeing provided by engagement with the Walled Garden.
Community Offer: None/Low	<p>There is currently very limited access to the asset and therefore a minimal offer. The boundary wall with the Walled Garden is recognised to have supported the offer in the walled garden. However, as the boundary walls is in poor condition this area of the walled garden is currently fenced off.</p> <p>The site provides accommodation for a member of Trust staff and is partly used as a grain dryer by Fyvie Estate Management.</p>
Accessibility: None	The asset is not currently accessible to visitors to the site.
Learning Value: None	Due to the limited accessibility of the asset, it is not currently deemed to have any Learning Value.

Socio-Economic

Segment & Rating	Findings
Partnerships: Medium	While there are no external partners currently connected to the asset, the asset is recognised to play a role in the interactions between the Trust and Fyvie Estate Management.

Economic

Segment & Rating	Findings
Financial Sustainability: None	<p>The asset currently provides no significant financial contribution to the Estate.</p> <p>It is noted that the asset is eligible for Annual Repair Grant (ARG) funding.</p>
Growing Support: None	There is no current focus on using the Home Farm to grow support for the organisation.
Economic Benefit: None	There is no significant economic benefit that can currently be assigned to the Home Farm.

Environmental

Segment & Rating	Findings
Contribution to Net-zero: None	It is not recognised that the Home Farm currently provides any contribution to the Trust's aim to be carbon negative by 2031.
At Risk: Medium/High	The condition of the site provides the most significant risk factor to the site. While an example of double-counting within the Framework (overlap with Condition) it is considered essential that this risk is recognised.
Condition: None/Low	The site is on the Buildings at Risk register.
Biodiversity & Geodiversity: None/Low	There is no current significant biodiversity at the asset, although the possibility that the asset provides a habitat for bats is high.
Adaptability: Medium	<p>Adaptability is limited by the current condition of the asset and the need for investment to stabilise the site. It is also recognised that any adaptations to the asset must take into account the continuing ownership of part of the asset by Fyvie Estate Management. It is in recognition of this that the asset has been ascribed a Medium rating.</p> <p>However, the historic role that the site played, as both a hub for the Estate, and the local community offers significant scope and precedent for adaptability.</p>

NEWHAILES

Overview

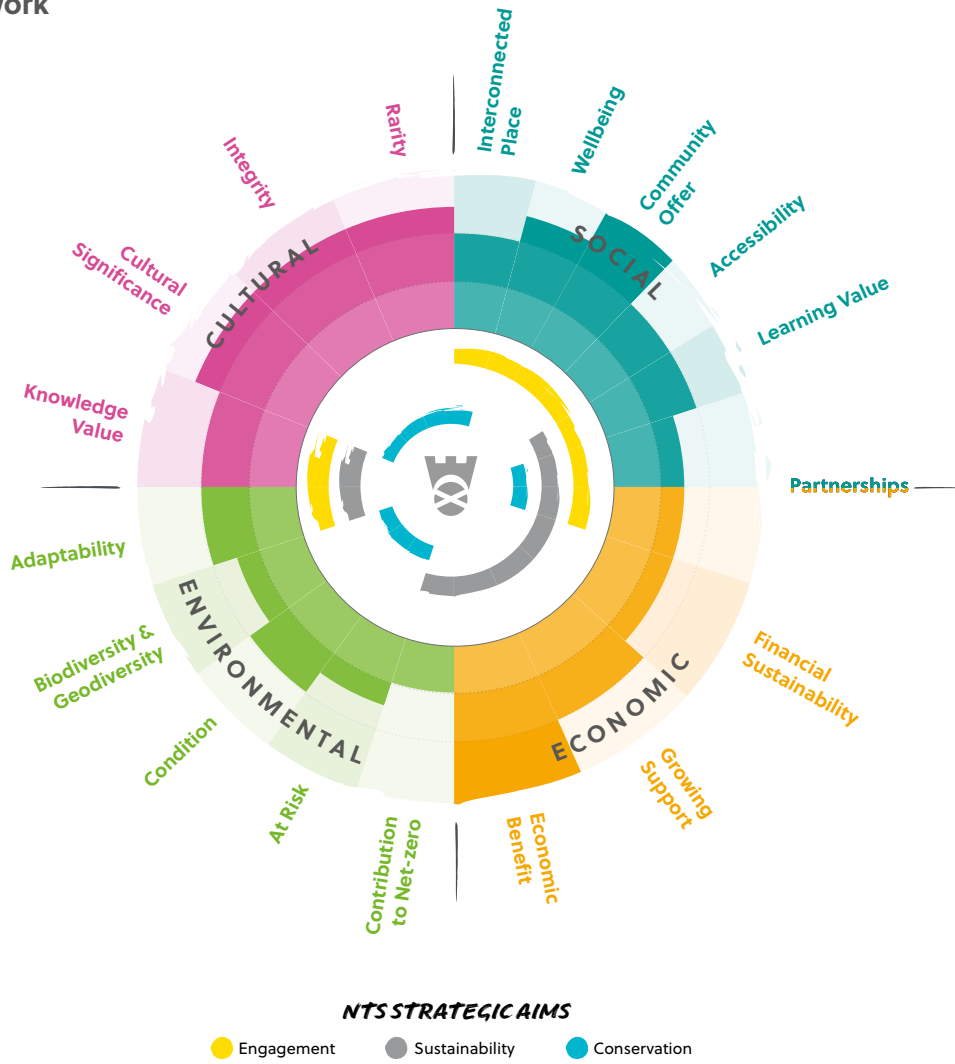
Site:	Newhailes
Acquisition Date:	1997
Declared Inalienable:	No
Designation (s):	<ul style="list-style-type: none"> • 2 x A Listed Building (Newhailes House with Gatepiers; Newhailes House, Stables) • 5 x B Listed Building (Newhailes House, Earl of Stair Monument; Newhailes House Dovecot, Newhailes House, Shell Grotto; Newhailes Road Newhailes House Gatepiers, Gates, Quadrants, Railings and Policy Walls; Newhailes House Walled Gardens, Fruit Store, Tea House, Ice House, Terraced Walk) • 1 x C Listed Building (Newhailes House, Gardener's Cottage) • 1 x IGDL (Newhailes) (Work of Art: High, Historical: Outstanding, Horticultural, Arboricultural & Silvicultural: None, Architectural: Outstanding, Scenic: High, Nature Conservation: Some, Archaeological: High)
Total area of the Site:	34.76 Hectares
Significance Rating in 2012 Review:	Exceptional

Site overview:

The Palladian villa, and surrounding grounds, at Newhailes is a well-preserved example of a predominantly eighteenth century designed landscape. The property has been utilised as a flagship for the Trust's conservation work and is increasingly focused on engaging with the local community through facilities such as the playpark, 'Weehailes', and a strong events program.



Values Framework



Summary Record of Workings for Framework

Cultural

Segment & Rating	Findings
Knowledge Value: Medium	Due to the conservation focus at the house, there has been significant research into the material fabric of the property although there are some continuing knowledge gaps, particularly in relation to design. There has also been significant investigation into understanding the archaeology and designed landscape at the site. A partnership with Edinburgh University, focused on the site's links with the Enlightenment, was historically in place.
Cultural Significance: Medium/High	The site is considered to have high cultural significance with particular note paid to the original James Smith villa, the Rococo interior scheme, and the interrelation of the house with its designed landscape. The site also has associational value, particularly through its links with the Dalrymple family, while the archaeological sites at the property are also notable. ³⁶

Cultural (continued)

Segment & Rating	Findings
Integrity: Medium/High	While Newhailes has developed over its history, there is a remarkable degree of survival of significant aspects of the earlier house and landscape, and later additions and alterations are seen as sympathetic to the original site. Since the Trust took over the care of the property in the 1990s, the conservation efforts have focused on minimal intervention, beyond what is needed to stabilise and secure the site's future. ³⁷
Rarity: Medium/High	While the Trust has other sites that reflect eighteenth century classical influences, these tend to be urban (notably properties on Charlotte Square) or rural estate centres (including Haddo House and House of Dun). Newhailes' suburban location, and particularly its remarkable degree of preservation, especially of decorative schemes and of elements of the designed landscape, ensure the site is relatively unusual within the Trust's portfolio.

Social

Segment & Rating	Findings
Interconnected Place: Medium	<p>Newhailes provides an interesting example for this Indicator. The site is very physically accessible for the local community; there is a right of way through the site, it is very open and the community feel significant ownership over access to existing routes through the landscape. The Social Values Toolkit for the site noted that the site was often experienced as a link between other destinations. The site also has viewpoints, notably over the Firth of Forth, and is within Edinburgh's greenbelt.</p> <p>However, the design of the site, notably the wooded areas around the edge of the site, preserve a distinct 'rural' feel for the site, which contrasts with the external environment surrounding the site which has seen significant development, including the railway line. Some of the site's land around Newhailes was sold off prior to the Trust's ownership.</p>
Wellbeing: Medium/High	<p>Evidence from Visitor Surveys for visitors who identified that they felt a lot healthier, happier or more relaxed as a result of their visit to Newhailes is mixed. Smaller survey samples from 2019 and 2020 fluctuate both higher and lower than the average for the year. The large survey sample for 2021 (629 visitors) indicate that those who felt a lot healthier, happier or more relaxed as a result of their visit are closely aligned with the average self-reported across the organisation.³⁸</p> <p>The site scored notably and consistently highly in response to the question of whether visitors felt a stronger connection to those they are with as a result of their visit.³⁹ Additional results suggests that site visitors come to spend time alone, or with friends and families and to entertain or occupy children.⁴⁰ This supports wellbeing for the individual, but the role of the site in providing space for these community engagements is noted in 'Community Offer'.</p>

Social (continued)

Segment & Rating	Findings
Wellbeing: Medium/High (continued)	<p>The Social Values Toolkit noted that the site's gardens provide visitors with a peaceful and reflective place. This reflects wider sector thinking, accelerated during the COVID-19 pandemic, highlighting the importance of accessing green spaces for wellbeing.⁴¹ The Toolkit also highlighted that the local community feel a high degree of ownership of and belonging to the site, encouraging feelings of security which is captured within the Trust's current definition of wellbeing.</p>
Community Offer: High	<p>A range of communities use the site and historically, there has been a division between the site's landscape and green space, which is used by the local community, and the house, which attracts specialist interest visitors. The site hosts a wide range of events, a monthly farmer's market, a café, a large play area and community allotments.</p> <p>The Social Values Toolkit highlighted the importance of the site as a social green space, offering communities the opportunity to share experiences and make connections as well as to exercise and to use as a connecting site. The importance of access to the site for the community was strongly expressed throughout the Report. The green space is also used as a space to experience wildlife, including bird watching.</p>
Accessibility: Medium	<p>The site is accessible by public transport, although it is recognised that attracting visitors from the centre of Edinburgh can be challenging. The site is easily accessible for the local community surrounding the site, and the importance of community access to the site was highlighted in the Social Values Toolkit.</p> <p>Some areas of the site are not currently accessible, including the walled garden and some of the areas close to the main house. The House is currently not accessible for users of wheelchairs although some of the site, including the café and the courtyard, are.⁴² The Social Values Toolkit also highlighted concerns about wheelchair access to the site as a whole, and the lack of places to stop and rest around the site.</p> <p>There is some interpretation available in different languages. The Visitor Survey from 2021 noted that the site had a much higher percentage of female visitors than the average Trust site, but that in other categories the site broadly matched other Trust categories and does not indicate that the site attracts a very diverse audience.⁴³</p> <p>The site has approximately 14,500 followers on Facebook and 294 followers on Twitter with both platforms active and focused on promoting events occurring at the site.⁴⁴</p>

Social (continued)

Segment & Rating	Findings
Learning Value: Medium	<p>Visits to the house are conducted by guided tour. Visitor surveys indicate that visitors do not currently feel a lot more knowledgeable about the site, Scotland's heritage, or the Trust, as a result of their visit⁴⁵ - but they also indicate this is not a site that people come to primarily within an intent to seek out new information.⁴⁶</p> <p>There is not currently a formal learning programme, but two Forest Schools have been using the site and during the pandemic Queen Margaret University used the site for outdoor learning for primary school teacher-training.</p> <p>There is some interpretation of the designed landscape around the site.</p>

Socio-Economic

Segment & Rating	Findings
Partnerships: Low/Medium	<p>There are surviving links to the family who previously owned the site, and the fields onsite have been rented out during the pandemic to a local farmer. Co-operation with external organisations also exist due to the nature of the collection, notably with the National Library of Scotland.</p> <p>Recently, increased requests for corporate volunteering opportunities have been noted.</p>

Economic

Segment & Rating	Findings
Financial Sustainability: Low/Medium	The site has an endowment fund and the commercial offer, particularly the catering offer, is expanding on site.
Growing Support: Medium	The site has a relatively high membership sign-up, but anecdotally it is noted that this is particularly due to a desire to access the playpark. ⁴⁷ The site has been a flagship property for the Trust's conservation credentials and won a number of conservation awards in the early years of the Trust's ownership.
Economic Benefit: High	While the site is not a primary tourist destination ⁴⁸ , and has a high percentage of non-paying visitors, the site was ranked as 12/88 sites for Total GVA Impact in the Social and Economic Impact Assessment, and 8/88 sites for Total Jobs Impact. ⁴⁹

Environmental

Segment & Rating	Findings
Contribution to Net-zero: Low	<p>While the site is not extensive, carbon will be stored in the trees and parkland on the site, although the extent is unclear and would be revealed through a Natural capital assessment.</p> <p>The NTS Natural Capital Assessment Executive Summary does not flag carbon storage on site but small amount of carbon sequestration through woodland on site.</p>
At Risk: Low/Medium	<p>The site is not considered to be at a high risk of physical damage from climate change, although localised storm damage and the threat from pests, notably moths, have impacted the site in the recent past.</p> <p>A significant housing development, of an estimated 5,000 new houses, is planned just to the west of the property. An increase in the local population will put increased pressure on the infrastructure of the site, although it is recognised that this will not directly impact the boundaries of the site itself.</p>
Condition: Medium	<p>The site's landscape is considered to be in relatively good condition and all buildings on the site have a condition rating of 'Fair'.</p> <p>The Social Values Toolkit highlighted that for the Gardens, the perception of limited management intervention was appreciated.</p>
Biodiversity & Geodiversity: Low/Medium	<p>The site is of some local importance, with particular species of interest including skylarks and bats. The site also contains the first examples of tree species, including the evergreen and Spanish oaks, being planted in Scotland.</p>
Adaptability: Medium	<p>The conservation approach, and therefore the presentation, to the main house is very fixed although there is the potential for re-interpretation as can be seen in the recent redevelopment of the tours. Wider spaces across the site have demonstrated the ability to adapt in response to the pandemic and have included the short-term lease of the fields to a local farmer and to respond to particular local community groups to use the site.⁵⁰</p>

PITMEDDEN

Overview

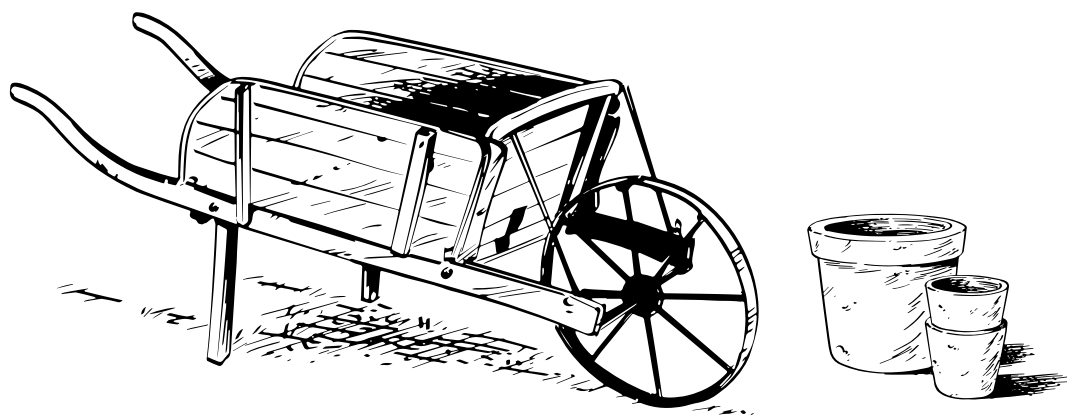
Site:	Pitmedden Garden
Acquisition Date:	1952
Inalienable:	Yes
Designation (s):	<ul style="list-style-type: none"> • 1 x A Listed Building: Pitmedden, Great Garden • 1 x B Listed Building: Pitmedden Limekiln • 2 x C Listed building: Pitmedden House; Pitmedden Garden & Estate, Farmhouse (former laundry), Stable, Open Shed, Steading & Bothy • IGD: (Work of Art: Outstanding, Historical: High, Horticultural, Arboricultural & Silvicultural: Some, Architectural: Outstanding, Scenic: High; Nature Conservation: Little; Archaeological: Not assessed)
Total area of the Site:	37.7 Hectares
Significance Rating in 2012 Review:	Some Significance

Site overview:

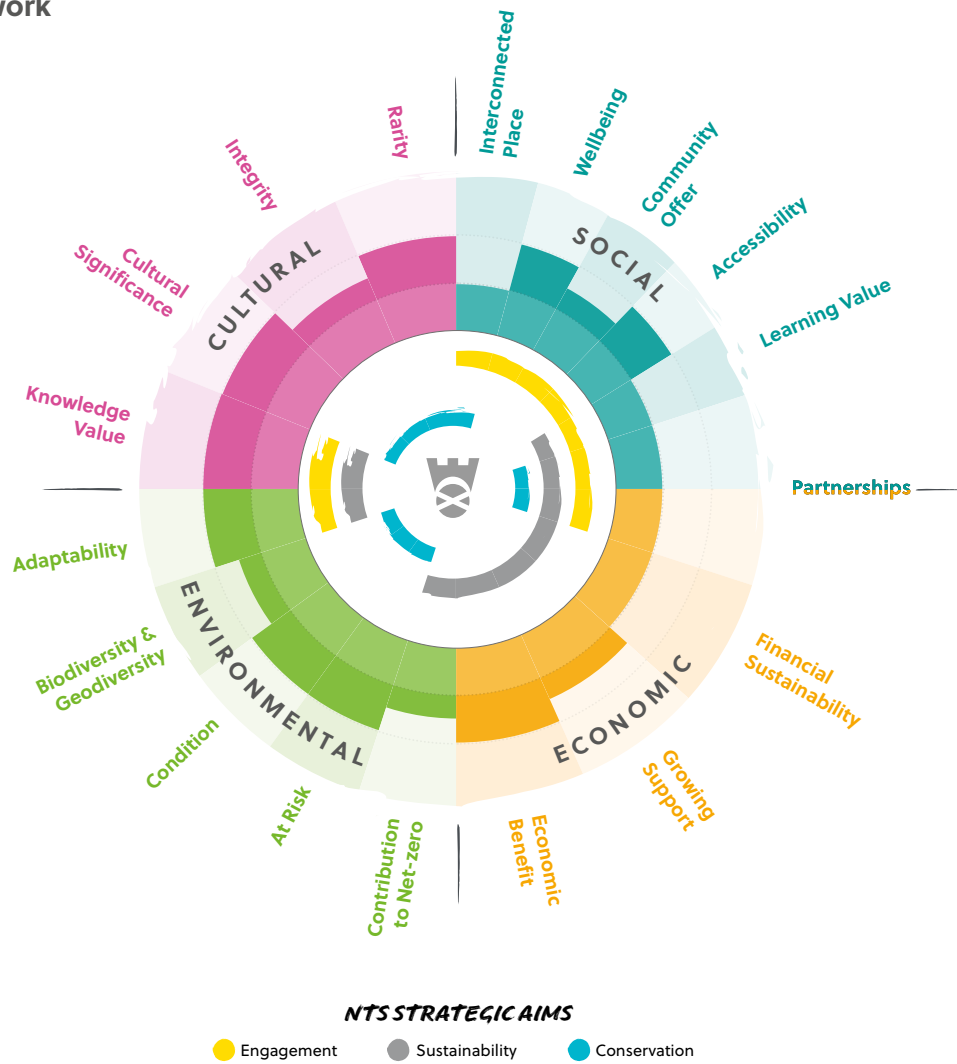
The Walled Garden at Pitmedden was originally created in the latter half of the seventeenth century and a number of the garden's buildings and features survive from this period. When the Trust acquired the site in 1952, the Walled Garden was restored in keeping with this seventeenth century style. Although no specific plans for Pitmedden survived, research built from surviving plans for other gardens at the time, both within Scotland and more widely in Europe.

The site also includes Pitmedden House (which includes leased apartments and areas for visitor operations), well-established orchards, the Museum of Farming Life, and is situated within a designed landscape reflecting the agricultural and residential uses of the site. The wider site includes leased residential cottages and land leased for agriculture.

The upper parterre of the Walled Garden has recently been re-designed.⁵¹



Values Framework



Summary Record of Workings for Framework

Cultural

Segment & Rating	Findings
Knowledge Value: Medium	There is a significant record of the Trust's work at the site although there are archival gaps prior to that, with surviving archives held externally to the Trust. There is no surviving record of the design of the garden in the seventeenth century.
Cultural Significance: Medium	The built features within the garden which survive from the seventeenth century are of high significance within the site, providing a direct link to the seventeenth century garden. The historic garden was recreated in the 1950s using what was known of comparable sites. The archaeology within the site supports understanding of the historic use and development of the site as an Estate, while the collection of the Museum of Farming Life is of some local significance as a reflection of historical farming practices in the North-east. The designed landscape reflects developments within the nineteenth and twentieth century, with limited evidence of earlier developments.

Cultural (continued)

Segment & Rating	Findings
Integrity: Low/ Medium	Many of the buildings and designed landscape around the broader site reflect developments of the historic estate over time. In the 1950s, the focus in the Walled Garden was to utilise the knowledge of contemporary gardens in the seventeenth century as the vision for the garden. Work has recently been completed on the upper parterre, developing a sustainable garden space, progressing the site from the plan devised in the 1950s.
Rarity: Medium	The scale of the walled garden is rare. There are other walled gardens within the Trust's collection, but the focus on the seventeenth century design at Pitmedden is more uncommon, both within the Trust and nationally. The wider site is not noted for its rarity, although the collection as a totality of the Museum of Farming Life, is uncommon.

Social

Segment & Rating	Findings
Interconnected Place: Low	The site is situated within an agricultural landscape, including parts of the estate that were sold off in the past. The site is largely shielded by trees from its surrounding landscape.
Wellbeing: Medium	<p>Evidence from Visitor surveys suggest the site was commonly above average for visitors who reported feeling a lot healthier and happier as a result of a visit to the site. In 2021 (with the largest number of respondents) the percentage reported was closer to the average than in previous years, and ratings for feeling more relaxed (which had been significantly above average in 2019 and 2020) was just below the organisational reported average (51.2% for Pitmedden, with 53.1% for the organisation as a whole); although it is also recognised that the replanting of the Upper Parterre also occurred this year.</p> <p>The importance of green space in the pandemic has been highlighted nationally and it is likely that additional research would increase our understanding of the wellbeing value contributed by the site.⁵²</p>
Community Offer: Low/Medium	The site offers walking trails utilised by the local community, a café, and theatre events/concerts in the summer. Harvested apples are sold in the autumn.
Accessibility: Medium	<p>The site has limited accessibility by public transport. Disabled parking is available on site. There are sixteen steps from the upper to the lower parterre of the garden, but the site as a whole is flat.</p> <p>The site has a presence on three social media platforms although posts are relatively infrequent.</p>
Learning Value: Low	Guided tours are hosted at the site, there is a nature hut in the grounds which contains information/interpretation panels. There is no formal education programme currently at the site.

Socio-Economic

Segment & Rating	Findings
Partnerships: Low	Relatively few partnerships were noted for the site – those that were noted (such as the Udney Community Trust) were primarily focused on localised sources of funding.

Economic

Segment & Rating	Findings
Financial Sustainability: Low	The site includes residential and agricultural leases. The site operates at a deficit.
Growing Support: Low/Medium	Within the Aberdeenshire portfolio, Pitmedden does not attract very high visitor numbers. ⁵³ While the sample size from Visitor surveys is relatively small the site attracts a higher number of members than the organisational average, ⁵⁴ although indications are of a lower number of overseas visitors. ⁵⁵ A fundraising drive, focused around the development of the upper parterre garden, was significantly impacted by the COVID-19 pandemic.
Economic Benefit: Medium	The Social and Economic Assessment Report placed Pitmedden as 24th/88 sites (including head and regional offices) for the total GVA impact of the site and was equal 23rd for the total jobs impact. Pitmedden was the fourth highest garden site within the Trust within the report.

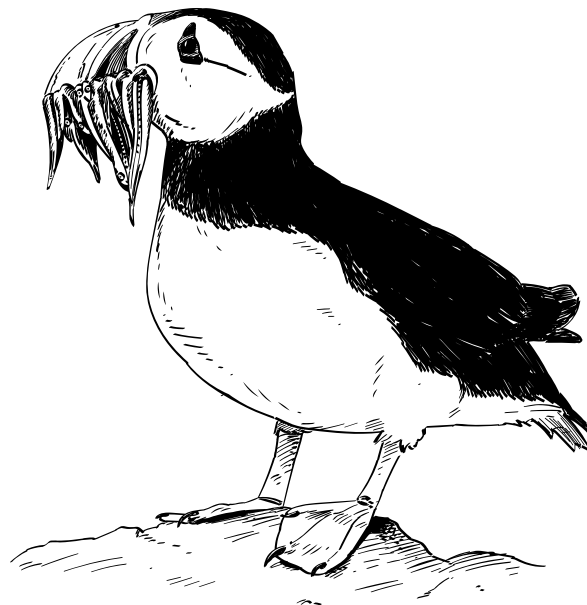
Environmental

Segment & Rating	Findings
Contribution to Net-zero: Low/Medium?	<p>There are solar panels on site and the development of the Upper Parterre garden has focused on sustainability and resource manning.</p> <p>Although the site is relatively small it is also recognised that there will be carbon storage, i.e. in the woodland that exists on site.</p> <p>The NTS Natural Capital Assessment Executive Summary: no carbon storage flagged, small amount of carbon sequestration through woodland highlighted.</p>
At Risk: Medium	<p>The A175 report assessed the site as a whole to be at a low risk from climate change. However, there is a recognised risk from pests and disease, with a particular current focus on the box, to the plants within the garden. There is also pressure from potential developments around the site.</p>
Condition: Medium	<p>The garden is assessed to be in good condition. The woodland is also largely in good condition although it is noted that it is a largely single-age woodland. The majority of the buildings on site (29/35) are in either good or fair condition, with five structures considered to be in poor condition and one (the South Mains Farmhouse) designated as a Building at Risk. Without the Building at Risk, the site would have been assessed as Medium/High.</p>
Biodiversity & Geodiversity: Low/Medium	<p>It is recognised that the site is small, although there are a variety of habitats within the site. There is evidence of protected species, namely red squirrels and bats, on site.</p>
Adaptability: Medium	<p>While continuing the seventeenth century focus of the garden, there is potential for adaption (as has occurred in the recent development of the Upper Parterre Garden). External to the Walled Garden it is recognised that assets have a variety of uses and include a number of leases.</p>

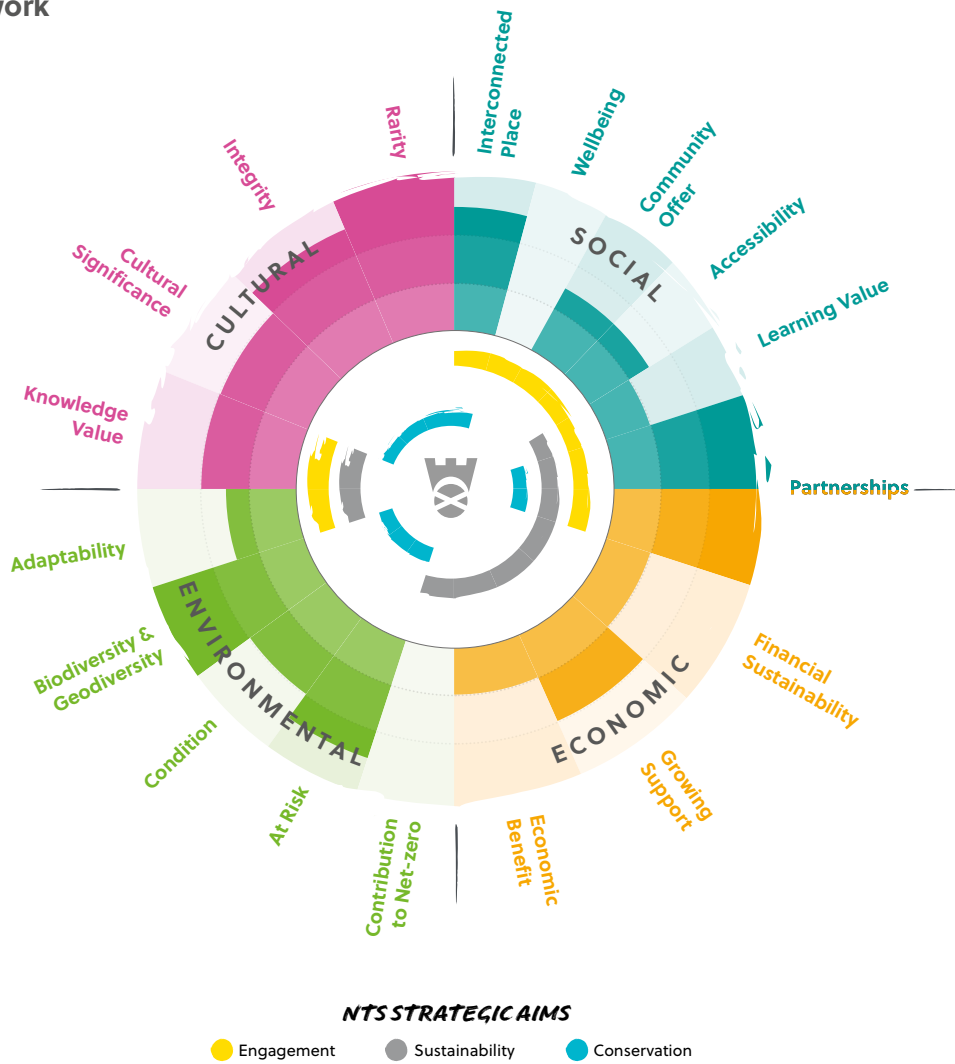
ST ABB'S HEAD

Overview

Site:	St Abb's Head NNR
Acquisition Date:	Assorted – Land on site Acquired between 1980-2006
Declared Inalienable:	Mixed: St Abb's Head and Lumsdaine Farm inalienable, remaining area around site alienable
Designation (s):	<ul style="list-style-type: none"> • 3 Scheduled Monuments (St Ebba's Chapel & Precinct (also known as Rampart Hall), St Abb's Kirk (church and monastic remains), Lumsdain Settlement) • 2 C Listed Building (Boat House at Mire Lodge, Ranger's House and office) • 2 SSSI: St Abb's Head to Fastcastle, Berwickshire Coast Intertidal • 2 Special Area of Conservation: St Abb's Head to Fastcastle, Berwickshire & North Northumberland Coast • Special Protected Area: St Abb's Head to Fastcastle • 2 Geological Conservation Review Site: St Abb's Head, Pettico Wick to St Abb's Harbour • 1 NNR: St Abb's Head • 1 Marine Conservation Area: Berwickshire • 1 Voluntary Marine Reserve – St Abb's Head and Eyemouth • 1 Seal Haul-out site: Fastcastle • 1 Marine Environment High-Risk Area: Coldingham
Total area of the Site:	170 HA
Significance Rating in 2012 Review:	Considerable Significance
Site overview:	St Abb's Head is a National Nature Reserve famed for its seabird colonies. Comprising dramatic cliff scenery, as well as the Mire Loch, and a range of archaeological sites, the site is celebrated for its biodiversity.



Values Framework



Summary Record of Workings for Framework

Cultural

Segment & Rating	Findings
Knowledge Value: Medium	<p>The site has species monitoring records especially for seabirds, with data for some species going back to the 1970s, monitoring the size and productivity of colonies. The site has also contributed to national studies in partnership with universities such as that with Edinburgh Napier University between 2014-19 which looked at the impact of disturbance to the site.</p> <p>There are also excavation reports linked to the archaeological sites, notably St Ebba's Chapel, at the site.</p>
Cultural Significance: Medium	<p>The site has evidence of occupation across at least 3,000 years and the Scheduled Monuments and Listed Buildings on the site reflect a number of the stages of human engagement with the landscape.</p>
Integrity: Medium/High	<p>While recognising that landscapes inevitably change and respond to the climate, the integrity of the site ensures its continuing role as a significant wildlife habitat. Internal Trust Assessments scored the site 7/10 for Naturalness.⁵⁶</p>

Cultural (continued)

Segment & Rating	Findings
Rarity: High	St Abb's is one of the most designated natural heritage sites in the UK and is one of eight NNR's in the Trust's care. Nationally, there are a number of other NNRs which focus on coastal landscapes that support coastal bird colonies, such as Hermaness and Noss, but the mainland location of St Abb's ensures it is particularly rare.

Social

Segment & Rating	Findings
Interconnected Place: Medium/High	There are no clear property boundaries to the property, with the cliffs providing viewpoints for the surrounding coastal landscape. The Stable structure is partly run by the Trust and partly run privately as a Café and Gallery space by the local farmer.
Wellbeing: [High?]	<p>Visitors tend to come to the site to experience the dramatic coastal landscape and its biodiversity. There were a limited number of respondents to the Visitor Surveys for the site so while all respondents indicated that the site made them feel happier and more relaxed significant, detailed conclusions cannot be extrapolated.</p> <p>However, research is indicating that the outdoor, particularly coastal, nature of the site, is likely to have a significant impact on wellbeing and it is likely that the site would have a High Wellbeing value if additional research was undertaken.⁵⁷ There is significant work being undertaken within the Trust to develop how understandings of Wellbeing might be measured.</p>
Community Offer: Low/Medium	There are three trails offered around the site offering a variety of experiences. The site is a haven for bird-watchers and recognised as a high-quality site for diving. Talks and cliff-walks with staff take place when capacity allows.
Accessibility: Low/Medium	<p>The site is easily accessible by road and there are facilities on site for cyclists. Accessing the site by public transport is possible. There is limited wheelchair access due to the nature of the site although an all-ability path is available to a viewpoint and there is the potential to drive to the Lighthouse.</p> <p>The website contains a significant number of photos taken by a local nature photographer which reflect the wildlife that can be seen at St Abb's throughout the year. The site is active on Facebook, with around 4,500 followers.</p>
Learning Value: Low	Cliff-top talks for visitors take place and a Wildlife Spotter's Guide is available online. There has been some engagement with groups, such as the Girl Guides, in a learning setting but there is no current established education programme. ⁵⁸ There is some interpretation at the site, particularly focused at the Nature Centre. ⁵⁹

Socio-Economic

Segment & Rating	Findings
Partnerships: High	<p>The site has numerous partnerships in place focused particularly on the biodiversity of the area. This includes co-operation with the RSPB, Berwickshire Marine Reserve, Nature Scot and Natural England.</p> <p>The site also has partnerships in place with the local community most notably with the local farmer who runs the Café & Gallery space next to the site and works with St Abb's for grazing of land when appropriate.</p>

Economic

Segment & Rating	Findings
Financial Sustainability: Low	<p>There was a significant increase in visitor numbers during the pandemic but the nature of the site, currently, does not lend itself to significant income generation.</p>
Growing Support: Medium	<p>The site is specifically used in Trust marketing, as well as local marketing for the region.⁶⁰ The site has also been used as a location for high profile filming and photoshoots.</p> <p>On site, the Trust brand has a relatively low visibility.⁶¹</p>
Economic Benefit: Low	<p>The Social and Economic Assessment Report suggested that the site's total GVA placed it at 68th out of 88 sites (including Head and Regional Offices).</p> <p>Anecdotally, the site is recognised to have a large catchment area, drawing visitors from across the region, as well as from further afield. However, due to the nature of the site, this has not been captured as data for the Trust.</p>

Environmental

Segment & Rating	Findings
Contribution to Net-zero:	<p>While the site requires limited energy to maintain, a Natural Capital Assessment for the site will provide significant information regarding carbon storage and would significantly affect any understanding of the site's contribution to Net-Zero.</p> <p>The NTS Natural Capital Assessment Executive Summary: Very small amount of carbon storage (non-woodlands) flagged, very small amount of carbon sequestration through woodlands noted.</p>
At Risk: Medium/High	<p>The A175 assessment did not consider the physical site to be at a significant risk from climate change.</p> <p>However, this does not capture the impact of human activity (including speed boats and proposed Offshore Wind Farms) and climate change on the site's biodiversity, particularly the sea bird colonies which are recognised to be vulnerable to the impact of the changing climate.</p>
Condition: Medium	<p>The buildings on site are recorded as either in fair or poor condition. The observed numbers in colonies of Shags, Herring Gulls, Kittiwakes, Fulmars, Puffins (and to a lesser extent Razorbills) have been declining in size although productivity, among species colonies for which records are taken, is more varied. The condition of archaeological sites is monitored by site-staff.</p> <p>No known data is available to reflect the condition of the site more generally.</p>
Biodiversity & Geodiversity: High	<p>The site is recognised to be a highly significant site for wildlife including a wide variety of sea-birds, mammals, notably grey seals, and invertebrates, particularly the Northern Brown Argus butterfly. The site contains a wide variety of habitats, encouraging a range of biodiversity, and is also noted as an important site for geomorphology.</p>
Adaptability: Low/Medium	<p>Elements of the site have recently been adapted, either through a change in ownership as was the case for grazing land sold to the local farmer (but which did not involve a change in use), or a proposed change of use, as is the case for the Nature Centre which is to be re-imagined primarily as an education space.</p> <p>However, any adaptations to the site must be focused on minimising disruption to the site's biodiversity and this limits significant changes that could be made to the site.</p>

VALUES FRAMEWORK ASSESSMENT TOOLKIT

INTRODUCTION: WHAT IS THE VALUES FRAMEWORK INTENDED TO DO?

The Framework has evolved within the Portfolio Review project, developed by Built Environment Forum Scotland (BEFS) in partnership with the National Trust for Scotland.

The Framework has been developed to:

- *Highlight the potential for individual sites to demonstrate key organisational values*
- *Highlight the opportunities sites represent to enhance the delivery of the Trust's strategy*
- *Allow the identification of actions to improve performance and consider future investment*
- *Support the shaping of priorities for future acquisitions by identifying gaps within the existing Portfolio*
- *The Framework is intended to build from existing data and work within the Trust, and capture information from a wide variety of developed and developing workflows.*

DEVELOPING THE VALUES FRAMEWORK

The Values Framework has been adapted from the Sustainable Investment Toolkit (see Appendix 1 for the original SIT Toolkit) for the Trust as part of the organisation's Portfolio Review.⁶² It builds from an international desire for a holistic understanding of the importance of cultural heritage and natural heritage, and looks to more clearly articulate the values that sites have, as articulated against the four pillars of sustainability: cultural, social, economic and environmental.

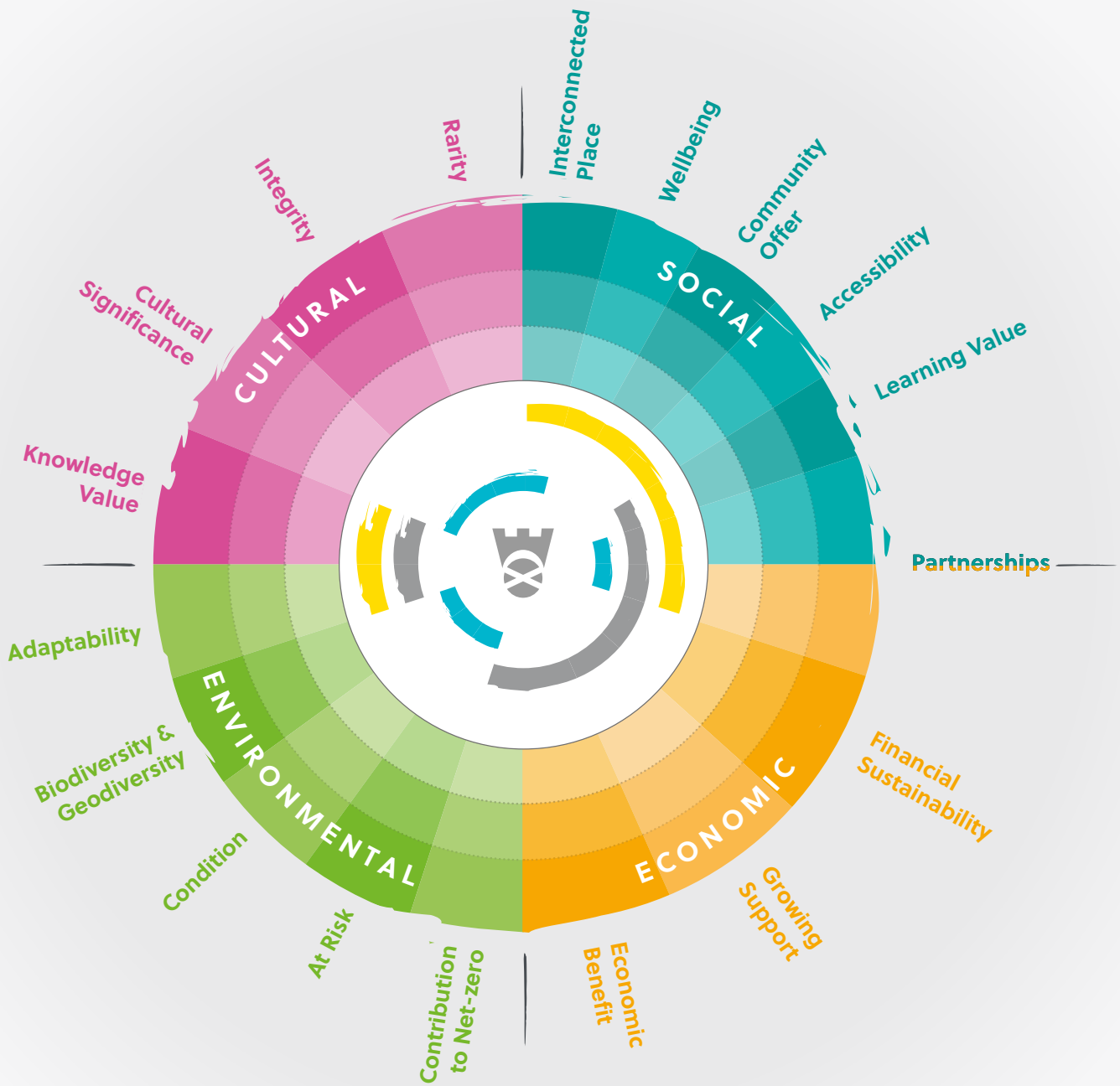
Trust-specific adaptations have been made to develop the Values Framework. These have included:

- A** *Demonstrating alignment with the Trust's statutory purpose and strategic priorities*
- B** *Developments in terminology in the wider sector since the production of the SIT, particularly regarding environmental benefits and the declaration of a climate crisis*
- C** *The condition of sites, reflecting their long-term ownership by a conservation charity*
- D** *The intent to produce a framework that is applicable beyond built heritage assets*
- E** *The availability of accessible information*

The Framework has been designed to develop from the Trust's existing work on values and to use data and information that the organisation has already developed or is in the process of developing.

Drawing on the organisation's statutory purpose and strategic priorities, 18 indicators have been identified. These are listed and defined in the Table above on pages 10-21.

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

HOW TO USE THE DESK-BASED ASSESSMENT TOOLKIT?

The Desk-based Assessment Toolkit is designed to be used by a single individual or a small group. It builds from the Trust's existing information and datasets, and allows for a preliminary completion of the Values Framework.

Gathered information will be used to assign a low/medium/high rating to each indicator where possible. If there was not deemed to be a sufficient degree of information available to make a judgement about a particular indicator, it should be left blank. It has been found useful to record why indicators have been assigned to particular levels. This will help further use of the Toolkit and serve as a record for future understanding.

While this process can stand alone, it is highly recommended that this Desk-based process is considered an initial stage, prior to taking the resulting preliminary framework into workshops. This will serve to minimise data or knowledge gaps as well as the potential for subjectivity.

Pilot Case Studies were developed as part of the Portfolio Review. These provide an early indication of this process and have informed the development of this Toolkit and the accompanying Workshop outline.

When engaging with the Framework we suggest the following is taken into account for NTS:

- **Portfolio not Property:** *While the Framework is intended to capture information related to individual assets/sites, it will be utilised to highlight the strengths and areas for improvement within the Portfolio as a whole, rather than those of individual sites.*
- **Manage Expectations:** *There is a need to manage expectations - no asset or site is likely to meet all segments of the Framework and indeed it would be highly unlikely if this was the case.*
- **Proportionality:** *The Framework will be utilised across assets and sites of significantly varying scale and use. It is important to bear this in mind during completion of the Framework.*

Recognising the breadth of the portfolio and the complexity of individual sites completing the Framework is not without its challenges. During the development of the pilot case studies the following learnings and reflections were noted:

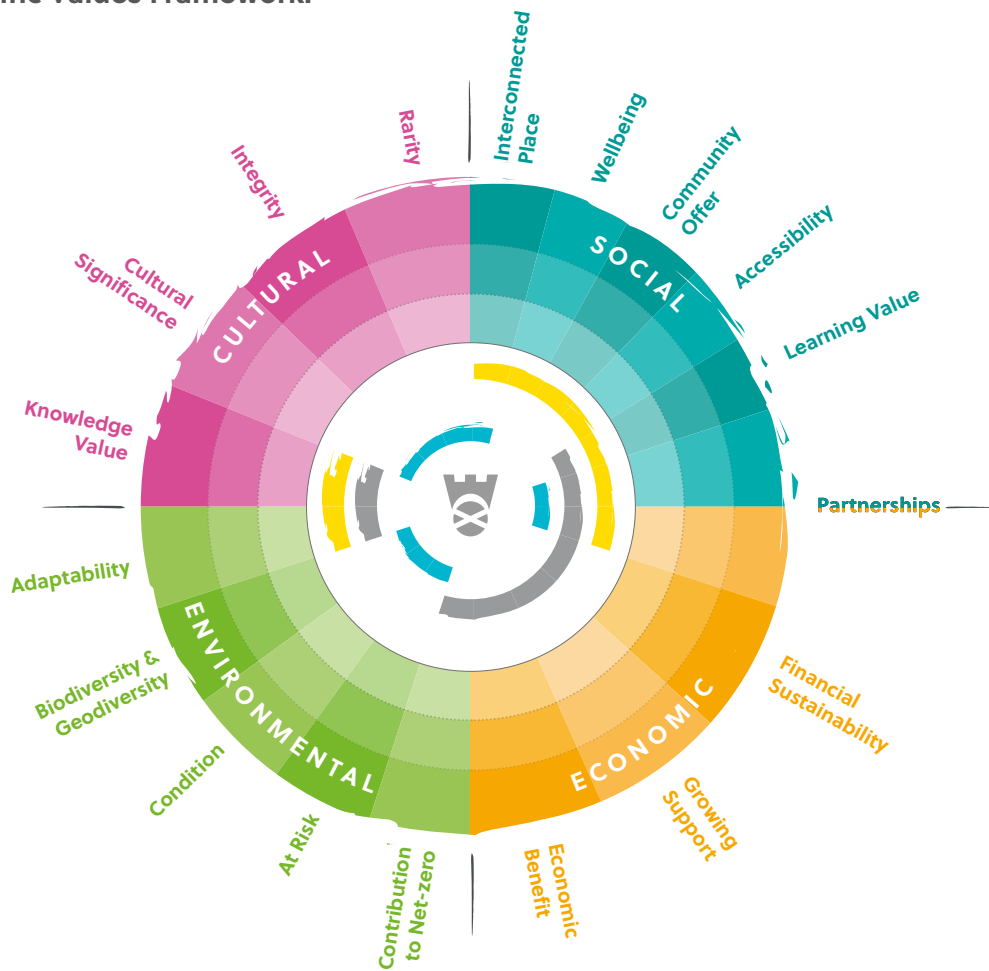
- **Lack of consensus:** *Differences of opinion may arise over any segment or asset. These should be acknowledged, and a record should be maintained of areas in which there was a lack of consensus, particularly for pilot case studies, as an Appendix/Details of a site-completed Framework.*
- **Balancing Assets within a site:** *Within a site, there is a need to acknowledge that individual assets can deviate from the general assessment of a site as a whole. A particular asset, for example, might be deemed particularly rare in a site in which other assets are more common, or one asset might be in a poor condition in a site that is broadly considered to be in good condition. Where this has been deemed to be the case, it has been taken into account and acknowledged. It is recognised that there is an element of subjectivity regarding the emphasis that is placed on the individual asset, although a greater impact has been noted if the exception impacts what is deemed to be the principal asset of a site.*
- **Inconsistencies in Available Information:** *Not all sites have the same quantity and quality of available information. Gaps, or particularly informative site-specific pieces of work, should be acknowledged.*
- **Double Counting:** *Double counting should be minimised wherever possible. The information captured in the pilot case studies and in Table 1 aims to support consistency in this process. However, there are also rare occasions in which double counting is inevitable. The most notable example of this is for sites that are primarily 'At Risk' because of their poor condition. Where this overlap has occurred in Case Studies it has been noted for future reference.*
- **Capturing Potential:** *Information shared about the site can often include discussion of future plans for the site. These should not be taken into account when assessing indicators unless the purpose of the exercise is to assess the future potential of an investment. Within the Case Studies, some future plans have been captured in footnotes where relevant to demonstrate intent or operational focus but have not been factored into assessments.*

TEMPLATE FOR CASE STUDY COMPLETION

Overview

Site:	XXX
Acquisition Date:	XXX
Declared Inalienable:	XXX
Designation:	• XXX
Total Area of the Site:	XXX
Significance Rating in 2012 Review:	XXX
Site overview:	XXX

Asset Specific Values Framework:



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



Record of Workings/Discussion for Framework (notes for each indicator)

Aligned to the information and data sources below:

Quadrant	Segment	Definition	Descriptors	NTS - Strategy	Informed By:	Work in Development / Future Potential	Notes for working with Framework
			(Scale with 'High' and 'None' definitions provided for guidance)		Site General	Asset Specific	N.B. This reflects work at the level of the organisation not the site
Cultural	Knowledge Value	The extent to which a site/ asset has contributed to the canon of existing knowledge and research. Can incorporate quantity/ quality of existing site-specific records and archives as well as the work of existing research to indicate gaps	High: This site/ asset has significantly contributed to the existing canon of knowledge None: The site/ asset has no existing research connected to it and little potential to increase insight	● ●	<ul style="list-style-type: none"> Organisational/ Academic Literature Scale & quality of connected archives Existing/Potential Research Partnerships 	Archaeological sites: Archaeology Framework (2016) / 'An Archaeological and Historical Chronology' (2011) Quantity and Quality of Survey data (i.e. Archeological, Historic Landscape, Biodiversity reporting (Note not content of Surveys but to reflect historic site-specific data))	Development of academic partnerships to address existing knowledge gaps
Cultural	Cultural Significance	The extent to which a site/ asset has archaeological, architectural & technological, artistic, aesthetic, associative, commemorative, historical, scientific, spiritual/religions, symbolic/iconic value	High: The site/ asset is of national cultural importance None: The site/ asset is not of national cultural importance and has limited local importance	●	<ul style="list-style-type: none"> Existing Management Plans/ Property Statements Information collected for Designations (see 'Asset Specific' for specifics) and declaration of Inalienability where appropriate 	Built Estate: Scheduled Monuments, Listed Buildings Archeological sites: Internal assessment of significance of archeology at Visited Properties (Archeology Resource) Natural estate: i.e. IHB, NSA, SSSI, Historic Battlefields Moveable Collections: Significance ratings entered into Collections Database (note these are object specific) Gardens: IGDL; assessments within Garden Review (2017)	Recognised that captured information reflects current/historic understandings of significance. Particular potential to expand with increased understanding of what significance means to audiences (i.e. as captured by 'Culloden 300' Report)

Quadrant	Segment	Definition	Descriptors	NTS - Strategy	Informed By:	Work in Development / Future Potential	Notes for working with Framework
			(Scale with 'High' and 'None' definitions provided for guidance)		Site General	Asset Specific	N.B. This reflects work at the level of the organisation not the site
Cultural	Integrity	This measure focuses on the 'completeness' of a site/ asset to what is currently known of its original form, location and/ or design intent ¹	High: The site/ asset has had limited or no alterations retaining original features and context None: The site/ asset includes none of its original features and/or is divorced from its original context	●	<ul style="list-style-type: none"> Existing Management Plans/ Property Statements & Archeological & Historic Landscape Surveys Information collected for Designations (see 'Asset Specific' for specifics) and declaration of Inalienability where appropriate 	Built Estate: Building Report, Historic Buildings Surveys Natural Estate: Existing ratings for 'Naturalness' / Human Impact on site Moveable Collections: Input related to provenance of collection/ collection indigenous to site Gardens and Designed Landscapes: Historic Garden Plans Archaeological sites: recognised that this would refer to the integrity of the archaeological site as documented	
Cultural	Rarity	The extent to which a site/ asset is unique within the Trust Portfolio, within the locality, or nationally	High: There are few, or no other existing examples of this site/ asset nationally None: There are many other examples of similar sites/ assets within the Portfolio and/or within the site/ asset's locality	●	Existing Management Plans/ Property Statements Situate within similar known examples in Portfolio and the wider sector (if known)	Asset Specific databases can provide an indication of the rarity of an asset within the Trust's portfolio Internal work has been done to situate the Trust's portfolio of archaeological sites alongside that of HES' Properties in Care	The challenge of situating information for the Built Estate within the wider sector is discussed within 'Built Estate Analysis' (2022) developed in parallel with this report. Recognised that there is the potential for an asset within a site to deviate from the site's norm. Where this has been deemed to be the case, it has been taken into account and acknowledged. It is acknowledged that there is an element of subjectivity regarding the emphasis that is placed on the individual asset (which would benefit from workshopping) but a greater impact has been noted if the exception impacts what is deemed to be the principal asset of a site.

¹ This Indicator looks to combine two indicators from 'Evaluating Significance and Heritage Values' (2020): Authenticity and Natural Integrity. The definitions provided are: Natural Integrity: 'the degree to which a place or ecosystem retains its natural biodiversity and geodiversity and other natural processes and characteristics'; Authenticity: 'Expressed through a variety of attributes include: form and design; materials and substance; use and function; traditions, technique and management systems; location and setting; language, and other forms of intangible heritage; spirit and feeling; and; other internal and external factors; Attributes such as spirit and feeling do not lend themselves to practical applications of the conditions of authenticity, but nevertheless are important indicators of character and sense of place, for example, in communities maintaining tradition and cultural continuity.

Quadrant	Segment	Definition	Descriptors	NTS - Strategy	Informed By:	Work in Development / Future Potential	Notes for working with Framework
			<i>(Scale with 'High' and 'None' definitions provided for guidance)</i>		Site General Asset Specific	<i>N.B. This reflects work at the level of the organisation not the site</i>	
Social	Inter-connected Place	The inter-relation of the site/ asset with its surrounding environment i.e. view/ viewpoints, wider landscape/ townscape, relationship to other surrounding / nearby buildings	High: This site/ asset has particular value within its location and in relation to a wider landscape None: This site/ asset is stand alone and has little or no relationship with its physical locality		Recognition that designations often exist across Trust boundaries to reflect the wider landscape i.e. WHS, NSA, Wild Land Area, Local Landscape Designation, Conservation Area Understanding of historic interrelation between site and surrounding landscape (i.e. was once one estate etc) and impact of recent planning decisions/developments for housing or infrastructure	No current existing comprehensive method for assessment of landscape value The Social Value Toolkit, recently piloted at Newhailes, offers insight into local perceptions of the interconnectedness of place. New social media monitoring tool to collate images in development stage	The focus for this indicator is on the physical rather than the emotional interconnection of the site. The emotional interconnection would be captured within either cultural significance or wellbeing as appropriate.
Social	Wellbeing	The extent to which a site/ asset increases the wellbeing of an individual, incorporating both the physical and emotional benefits gained from the site ²	High: This site/ asset makes a significant contribution to the wellbeing of those who utilise the site/ asset None: The site/ asset has no wellbeing benefits connected to it or provides a negative contribution to wellbeing		Utilise relevant criteria within Visitor Surveys i.e. information linked to impact of visit on respondent	Tools are currently in development to measure baseline wellbeing at sites for existing outreach activity, young people, and community wellbeing pre and post participation activities The Social Value Toolkit has recently been trialled at Newhailes and has significant potential for increasing understanding of which aspect of sites contribute to wellbeing Integrate with understandings of emotional connection to place (also linked to Cultural Significance) i.e. Culloden 300 project Significant external work has been developed in recent years, particularly linked to the the importance of green space to wellbeing.	The potential for overlap between the emotions associated with a site's cultural significance (i.e. if a site is used as a memorial) with wellbeing is noted. To minimise this where possible, the Trust's current definition of wellbeing, with its focus on mental and physical health, prosperity, security and safety has been used as the primary guide for information recorded.

² The Trust's current definition of wellbeing is "a catch-all term to describe the state of an individual or collective (e.g. the nation) encompassing mental and physical health, prosperity, security and safety" (National Trust for Scotland, 'Field Guide', 2021).

Quadrant	Segment	Definition	Descriptors	NTS - Strategy	Informed By:	Work in Development / Future Potential	Notes for working with Framework
			<i>(Scale with 'High' and 'None' definitions provided for guidance)</i>		Site General	Asset Specific	<i>N.B. This reflects work at the level of the organisation not the site</i>
Social	Community Offer	The extent to which the site/ asset provides, or has the potential to provide, a variety of local community spaces or facilities which are widely utilised. This would encompass both Trust-organised services (such as play-areas, exhibition spaces) as well as the use communities make of freely accessible spaces (dog-walking etc)	High: This site/ asset is utilised by a wide range of community stakeholders through varied engagements None: This site/ asset has no spaces, facilities or ability to be utilised by community stakeholders	●	The Social and Economic Impact Assessment Report included an assessment the range and scale of on-site activity (i.e. guided tours, community gardening etc.) Map existing community offer in discussion with site staff and utilising advertised information relating to past and future events. There is significant work in development to develop and standardise information in this area across the Trust – see Future Potential	The Social Value Toolkit, completed for Newhailes, provides invaluable insight into perceptions of the current community offer provided by the site. There is significant interest to trial this at other sites. There is also an internal proposal to develop both a Community Engagement Audit tool and a metrics wheel, based on the Place Standard Tool, to help facilitate discussion with Communities about Community Impacts. New Participation, Consultation and Engagement Framework and Toolkit in development (developed from Trust's Community Engagement Policy) to support decision making around community engagement. There is also developing work connected to relevance ie. Developed PhD proposal, discussion with pilot study with Leeds Museums and Galleries that includes relevance as part of commissioned conservation plans. New social media monitoring tool to collate mentions/topics etc in trial stage. Seperate project to do similar for images in development stage.	

Quadrant	Segment	Definition	Descriptors	NTS - Strategy	Informed By:	Work in Development / Future Potential	Notes for working with Framework
			(Scale with 'High' and 'None' definitions provided for guidance)		Site General Asset Specific		N.B. This reflects work at the level of the organisation not the site
Social	Accessibility	The extent to which an individual is able to relate to and interact with an asset. As indicated in the Trust's definition of accessibility this includes both physical and intellectual accessibility and can include real and virtual access ³	High: This site/ asset can be easily accessed by a diverse audience None: This site/ asset cannot be accessed and digital access or information is limited	●	<p>Accessibility Guides (where developed): Website/Staff consultation if not; Demographic information from Visitor Surveys</p> <p>Assessments of accessibility should, where possible, recognise the combination:</p> <ul style="list-style-type: none"> • Accessibility of Location (to public and private transport as well as for active travel) • Physical Accessibility of site (parking, level access, accessible toilets, accessible communication, lighting assessments etc.) • Digital Accessibility of site (content on Trust's website, analytics of engagement with website, presence on social media platforms etc.) • Inclusion of diverse audiences 	<p>The Social Value Toolkit, recently piloted at Newhailes, provides insight into how accessible the site is perceived to be by its local community</p> <p>An Audit Tool/ Standardisation Template for site-specific Site Access Statements is under discussion</p> <p>Increased digital analytics can be incorporated into information collated</p>	

³ The National Trust for Scotland's current definition of Access is 'The right or ability to enter, approach or make use of a place or thing. The Trust's integrated approach to access requires us to use the term to refer to a whole range of methods that people use to relate to and interact with the organisation, including physical, intellectual and sensory. This can include real and virtual access' (National Trust for Scotland, 'Conservation, Learning, Access and Enjoyment Principles'(2018).

Quadrant	Segment	Definition	Descriptors	NTS - Strategy	Informed By:	Work in Development / Future Potential	Notes for working with Framework	
			(Scale with 'High' and 'None' definitions provided for guidance)		Site General	Asset Specific	N.B. This reflects work at the level of the organisation not the site	
Social	Learning Value	The extent to which a site/ asset enables the development of skills and training for staff and volunteers and supports learning for visitors across both formal and informal education, and including a broad spectrum of learners ⁴	<p>High: This site/ asset contributes significantly to learning across a wide range of learners (both formally and informally)</p> <p>None: This site/ asset contributes little or nothing to formal or informal learning</p>	<p>● ●</p>	<p>Site specific information related to:</p> <ul style="list-style-type: none"> Numbers engaged (Workshops/ Programmes etc) Variety of learning opportunities offered Any feedback gathered from participants for effectiveness of formal learning programmes Presence/Absence of interpretation <p>Information related to Learning captured within Visitor Surveys</p> <p>Site-specific skills development for staff and volunteers (particularly related to traditional skills etc)</p>	<p>It may be useful to place this information within the context of the information captured within the Socio-Economic Impact assessment Report (2021)</p> <p>The proportion of visitors who described learning more about the place and its stories as having a strong influence on their decision to visit individual sites include:</p> <ul style="list-style-type: none"> Historic Houses & Palaces: 71% Castles/ Forts: 42% Heritage Centres: 83% Gardens: 25% Other Historic Properties: 52% Outdoor Nature Attractions: 26% Industrial/Craft: 78% 	<p>It is noted that a Group Activity sign-up sheet was developed in 2021. It includes a Skills Development category to record the intended skills development of any group volunteer activity and Year 1 activity related to volunteer groups has been analysed. This provides a post pandemic baseline for participation hours across volunteering, community partnership working and targeted groups and could be integrated into understandings of site-specific skills development</p>	<p>Recognised that assessments of interpretation and learning opportunities can be challenging to separate from subjective assessments of quality. Subjective information would benefit from additional input (i.e. in workshop format) to ensure consistency and Portfolio-wide perspective</p>

⁴ The Trust's current definition of learning is defined as 'enriching people's lives by sharing knowledge. Learning includes formal and informal education and is the process by which the Trust shares information on subjects and issues. Learning enables people to develop skills for use in many aspects of their lives and provides people with opportunities to learn more about how and why things happen, often providing first-hand experiences to learn from. We also learn from others and by evaluation of our own activities' (National Trust for Scotland, 'Conservation, Learning, Access and Enjoyment Principles' (2018)).



Quadrant	Segment	Definition	Descriptors	NTS - Strategy	Informed By:	Work in Development / Future Potential	Notes for working with Framework
			(Scale with 'High' and 'None' definitions provided for guidance)		Site General Asset Specific		N.B. This reflects work at the level of the organisation not the site
Social AND Economic	Partnerships	The extent to which the site/ asset has partnerships in place with other organisations, groups or individuals, ranging from national organisations to community partners	High: This site/ asset has a wide range of strong, purposeful collaborations in place None: This site asset has no partnerships currently in place	● ● ●	Acknowledge both: <ul style="list-style-type: none"> Site-specific partnerships Organisation-wide partnerships with direct implications for the site <p>Consideration should also be given to the strength and length of time over which partnerships have existed.</p> <p>Mapping exercise with site staff to reflect range of partnerships currently in place at the site</p>	New organisational partnerships are being set-up i.e. as part of the Participation programme to help deliver new initiatives (include Raleigh International, Paths for All Scotland, Venture Trust etc.) plus local community groups for the delivery of NTS Green Action	The potential for both formal and informal partnerships at a given site is acknowledged and both have been acknowledged where this information is known. Particular note has been taken to acknowledge formal partnerships where these exist as this is recognised to offer a degree of stability that can be, but is not always, in place for more informal arrangements
Economic	Financial Sustainability	The extent to which the site/ asset is financially sustainable without external subsidies but including site-specific funds and endowments	High: This site/asset is financially sustainable with no need for external subsidies None: This site/asset is not currently, or historically, financially sustainable and relies heavily on external subsidies	●	Internal site-specific financial information related to Net income	Built Estate: Include ARG eligibility where applicable	A Natural Capital Baseline of the National Trust for Scotland Estate Executive Summary, March 2022 - Natural Capital Research Ltd.

Quadrant	Segment	Definition	Descriptors	NTS - Strategy	Informed By:	Work in Development / Future Potential	Notes for working with Framework
			<i>(Scale with 'High' and 'None' definitions provided for guidance)</i>		Site General Asset Specific	<i>N.B. This reflects work at the level of the organisation not the site</i>	
Economic	Growing Support	The extent to which the site/ asset is central to the organisation's profile and has historically been used for fundraising and advocacy	High: This site/ asset is of significant importance to growing support for the Trust and has a highly visible profile for the organisation None: This site/ asset is of limited importance to growing support for the Trust and has a limited/no profile within the organisation	●	This measurement can include: <ul style="list-style-type: none"> Total number of visitors to the site Visitor Break-down (i.e. Member/Non-Member; UK/Overseas) Site-based membership sign-up Site specific fundraising Profile (visibility in Trust marketing, visibility on social media) Site-specific Member Centres /Friends Groups 	New social media monitoring tool to collate mentions/topics etc in trial stage. Seperate project to do similar for images in development stage.	It is recognised that current assessments of a site's profile is focused on visitor engagement - assessing the site's profile more widely is challenging although does offer scope for future research.
Economic	Economic Benefit	The extent to which the site/ asset provides economic benefit for the local area (local procurement, local employment, local tourist spend etc.)	High: This site/ asset contributes significantly to the local economy though employment, tourism etc None: This site/ asset does not provide economic benefit to the local economy	●	Draw on the information developed within the Social-Economic Impact Assessment Report (including data related to employment, project and procurement expenditure & contractors and visitor impacts) Site may also have access to supplementary data to deepen understanding		

Quadrant	Segment	Definition	Descriptors	NTS - Strategy	Informed By:	Work in Development / Future Potential	Notes for working with Framework
			<i>(Scale with 'High' and 'None' definitions provided for guidance)</i>		Site General	Asset Specific	<i>N.B. This reflects work at the level of the organisation not the site</i>
Environmental	Contribution to Net-zero	The extent to which the site contributes to the mitigation of climate change through carbon storage and sequestration and the reduction of emissions on-site	High: This site/ asset makes a significant / proportionate contribution to be carbon negative by 2031 None: This site/ asset is currently damaging to the environment and has limited/ no potential for adaption to contribute to net zero	●	Utilise information from Natural Capital assessments of the site particularly relating to carbon storage and sequestration Account for Promotion of active travel on site as well as information related to on-site energy use (energy system, machinery etc)	Built Estate: EPC's, Method of energy supply Trust carbon reporting requirement through SECR (Streamlined Energy and Carbon Reporting)	Sector work looking at Carbon Embodiment in buildings (i.e. Historic England 'Carbon in the Built Historic Environment' (2019) Planning involvement in workshops looking at Climate Vulnerability Index Workshop and Adapt Northern Heritage Workshop MSc dissertation proposal developed with UoS focused on integrating considerations of environmental values and impacts and mitigation of climate change into assessments of significance and development of long term vision. Planned introduction of new Environmental Management Scheme (EMS) with associated carbon plans at site/ asset/individual level

Quadrant	Segment	Definition	Descriptors	NTS - Strategy	Informed By:	Work in Development / Future Potential	Notes for working with Framework
			<i>(Scale with 'High' and 'None' definitions provided for guidance)</i>		Site General	Asset Specific	<i>N.B. This reflects work at the level of the organisation not the site</i>
Environmental	At Risk	The extent to which a site/asset is considered to be at threat. Primary threats can include the changing climate or planning/physical encroachment	<p>High: This site/asset is at significant risk from the impact of climate change and other external factors</p> <p>None: This site/asset is not at specific risk from the impact of climate change and other external factors</p>	●	<p>This measurement should take into consideration the At Risk Matrix, developed in alignment with the methodology developed with Historic Environment Scotland (HES), the National Trust and 3Keel. This Matrix is divided into four categories, ranked currently and for future potential across:</p> <ul style="list-style-type: none"> • Overheating & humidity • Storm Damage • Slope Failure • Soil Heave <p>Other factors may include live planning applications and related landscape impacting works.</p> <p>Additionally any collected information related to pests/invasive species and diseases which negatively impact the site</p>	<p>Natural Estate: The developing Natural Capital data includes information related to soil erosion prevention and flood risk reduction</p> <p>Individual site and species plans e.g. for seabirds and arctic alpines</p> <p>Planning applications - tracked through Local authority portals</p>	<p>There is the intent to update the At Risk Matrix. Potential to explore the social perception both of risk and what should be prioritised for protection</p> <p>Assets within the Portfolio can be at risk because of poor condition. While this is an example of double-counting within the Framework, it has been noted.</p>

Quadrant	Segment	Definition	Descriptors	NTS - Strategy	Informed By:	Work in Development / Future Potential	Notes for working with Framework
			<i>(Scale with 'High' and 'None' definitions provided for guidance)</i>		Site General	Asset Specific	<i>N.B. This reflects work at the level of the organisation not the site</i>
Environmental	Condition	The extent to which the site/asset is maintained to a high-conservation standard	High: This site/asset is in a sustained exceptional condition None: This site/asset is currently in a very poor condition	●		Built Estate: 'General condition' in Estate Classification Database; Quinquennial Surveys; Asset-specific 'Health Checks' as well as Conservation Performance Indicator (CPI) assessments. Natural Estate: NatureScot condition monitoring programme, property specific monitoring programme including as part of national schemes such as breeding seabirds Moveable Collections: Information recorded for individual objects on collections database. Condition monitoring for interior spaces. Gardens: CPI's in place for Gardens	Conservation Performance Indicators (CPI) to be developed for Landscape Need to ensure consistent recognition of what 'high-conservation' standards are for assets across the organisation. Recognised that there is the potential for an asset within a site to deviate from the site's norm. Where this has been deemed to be the case, it has been taken into account and acknowledged. It is acknowledged that there is an element of subjectivity regarding the emphasis that is placed on the individual asset (which would benefit from workshopping) but a greater impact has been noted if the exception impacts what is deemed to be the principal asset of a site.
Environmental	Biodiversity & Geodiversity	The extent to which the site supports biodiverse habitats and species and represents varied geology	High: This site/asset supports significant biodiversity and represents varied geology None: This site/asset supports limited/no biodiversity and little geodiversity	●	Information connected to Designations i.e. NNR, MCA, SSSI, SPA, SAC, Ramsar Results of biodiversity monitoring occurring on site Information contained within Management Plans	Natural Estate: Natural Capital model captures information related to biodiversity and pollinators; Species specific information, Conservation performance index (CPI) and NatureScot remedies database used to track status of designated features Gardens and Designed Landscape: Plant, including tree, surveys	New Plan for Nature to be published in 2022 – will identify key themes and programmes/ projects for nature across the Trust estate

Quadrant	Segment	Definition	Descriptors	NTS - Strategy	Informed By:	Work in Development / Future Potential	Notes for working with Framework
			<i>(Scale with 'High' and 'None' definitions provided for guidance)</i>		Site General	Asset Specific	<i>N.B. This reflects work at the level of the organisation not the site</i>
Environmental	Adaptability	The extent to which the site can be adapted or re-interpreted to suit developing need ⁵	<p>High: This site/ asset can be adapted to suit current and future need</p> <p>None: This site/ asset either cannot adapt or there is little or no demand for its adaption</p>	 	Range of current use, Range of potential changes of use, potential for asset re-interpretation	<p>Built Estate: Range of Current Use captured in the Estate Classification Database</p> <p>Natural Estate: Range of current use captured in Natural Capital Framework</p>	It is acknowledged that the potential for adaption can vary depending on investment. This indicator is aimed to capture the potential for adaption that would not fundamentally undermine the organisation's current understanding of the site's significance

⁵ This definition is compatible with the Trust's current definition of adaption as 'changing a place to suit the existing use of a proposed use' (National Trust for Scotland, 'Field Guide' (2020).

PORTFOLIO REVIEW VALUES FRAMEWORK: WORKSHOP SUPPORT DOCUMENT

This workshop is intended to sit alongside the Desk-based assessment process, acting to build from and support the completion of potential gaps identified during the latter exercise.

The Desk-based Assessment process is intended to be completed by a single or small group of individuals. It can highlight existing site-specific data-sets and information and be used to complete an initial Framework (see Portfolio Review Values Framework: Desk-based Assessment Toolkit).

Completing this initial process makes use of the significant degree of information that the Trust currently holds relating to sites and identifies site-specific gaps.

During the workshop, the results of the Desk-based Assessment process should be presented for discussion, with a particular focus on Indicators for which knowledge gaps have been identified.

Workshops would be intended to draw on the breadth of internal (and potentially, external) expertise linked to individual sites.

Discussion will support an increased understanding of what is valued about the site by those with particular expertise or who engage with the site regularly.⁶³

The Workshop would:

- *Establish what is meant by value and significance in this context and introduce the Values Framework*
 - *Establish why the Framework is being completed in this exercise (and the need for a Portfolio-wide perspective)*
 - *Present result of Desk-based Assessment & information sources consulted to recognise current position*
 - *It would be helpful if this information could be shared prior to the workshop to allow time for reflection prior to the Workshop*
- *Identify Indicators within the Desk-based Assessment Framework that require limited additional discussion. This is likely to relate to Indicators for which there is deemed to be sufficient existing data to fully inform the indicator or for which there is a broad consensus across Workshop attendees*
 - *Focus on Indicators that are highlighted to require additional discussion*
 - *Intention to input into Framework by the end of the workshop with a brief overview of why a particular decision has been made*
 - *Intention to seek consensus and, if not possible, to note where consensus was not possible*
 - *Unless a specific asset is being interrogated there is an intention to represent the site as a whole within the context of the Portfolio*

The workshop format can be repeated for different audiences with updated versions of the Framework presented as appropriate.

REFERENCES

- 1 The most recent example of this, which highlights the variety of values ascribed to Trust sites, was published as 'Evaluating Significance and Heritage Values: Heritage Planning Guidance' (2020). This substantive piece of work has been very valuable during the formation of the Framework detailed in this document.
- 2 National Trust for Scotland, 'Conservation, Learning, Access and Enjoyment Principles' (2018).
- 3 National Trust for Scotland, 'Conservation, Learning, Access and Enjoyment Principles' (2018)
- 4 The Review (2012) assigned the Trust's visited property portfolio a category of significance (exceptional, considerable and some) with significance defined as 'the combination of the aesthetic, historic, scientific and social value of that place' (Property Portfolio Review: Phase 1 Report Assessing the Heritage Significance (2012)). These categories of value were drawn from the Burra Charter, a charter focused on providing guidance for the conservation and management of places of cultural significance. Value, for the Burra Charter, is either aesthetic, historic, scientific, social or spiritual and an assessment of these values in combination provides evidence of the cultural significance of a place (The Burra Charter: The Australia ICOMOS Charter for Places of Cultural Significance (2013)). This definition has evolved slightly from 1979 when 'Cultural significance means aesthetic, historic, scientific or social value for past, present or future generations' (The Australia ICOMOS Guidelines for the Conservation of Places of Cultural Significance ("Burra Charter"), 1979).
- 5 While variations of Statements of Significance are utilised across the heritage sector, within the Trust's context Statements of Significance were specifically designed to evaluate 'the significance or value of the property, both in terms of its heritage values (e.g. natural, cultural heritage or landscape value) and in terms of the visitor experience and the social and economic context' (National Trust for Scotland, Falkland Palace Property Statements 2002-2005' (2002)). The information contained within current Statements tends to err towards the heritage, or cultural, value of a site although in more recent years information regarding the visitor experience and social and economic context of sites has increasingly been developed.
- 6 The Four Pillars of Sustainability were adopted at the global level in the Hangzhou Declaration (2013) and by the European Union in 2015 (EU, Cultural Heritage Counts for Europe: Full Report (2015)). They have also been used by heritage organisations in both Scotland (Our Place in Time: Extended Report of the Built Heritage Investment Group Supplementary Information (2019) and England (Historic England, via Heritage Counts, produce annual reports on the role of Heritage and the Economy, Heritage and Society and from 2020, Heritage and the Environment in England which demonstrate the key role the historic environment can have in these areas (Historic England, 'Heritage Counts', <https://historicengland.org.uk/research/heritage-counts/> (Accessed 14/01/22).
- 7 'Our Place in Time, Extended Report of the Built Heritage Investment Group: Investing in our Built Heritage Group – Towards a Built Heritage Plan Supplementary Information (2019): 3.
- 8 <https://www.befs.org.uk/policy-topics/prioritisation/> (Accessed 20/04/2022)
- 9 E. Robson, 'Newhailes House and Gardens Social Values Assessment Report' (2022).
- 10 K. Boal & R. Curtis-Machin, 'Culloden 300: Living with the Battlefield' (2019)
- 11 BiGGAR Economics, 'Economic Impact Assessment of NTS Proposals for Fyvie Castle' (2019)
- 12 E. Robson, 'Newhailes House and Gardens Social Values Assessment Report' (2022).
- 13 K. Boal & R. Curtis-Machin, 'Culloden 300: Living with the Battlefield' (2019)
- 14 BiGGAR Economics, 'Economic Impact Assessment of NTS Proposals for Fyvie Castle' (2019)
- 15 <https://www.nts.org.uk/visit/places/balmacara-estate/highlights/scotlands-rainforest>
- 16 <https://www.croftingyear.org.uk/croft-management.asp> (Accessed 25/02/22)
- 17 Numbers taken 27.02.22
- 18 I.e. <https://www.croftingyear.org.uk/croft-management.asp>
- 19 The 88 sites include regional and Head offices.
- 20 <https://www.gla.ac.uk/schools/critical/research/researchcentresandnetworks/robertburnsstudies/ourresearch/jacobiteofficersdatabase/>
- 21 It has been recognised that the areas of the battlefield outside the NTS site are highly significant to understandings of the battle and are surprisingly intact, although not protected from future development.
- 22 http://portal.historicenvironment.scot/hes/web/f?p=1505:200:::NO:RP:SEARCH_UNDERWAY:1
- 23 Results from Visitor Surveys:
 - Healthier: 2021: 10.6%, 2020: 7.3%, 2019: 14.1%
 - Happier: 2021: 35.4%, 2020: 35.8%, 2019: 31%
 - Relaxed: 2021: 42.3%, 2020: 39%, 2019: 44.4%

A sense of pride in Scotland: 2021: 51.7%, 2020: 52.8%, 2019: 56.3%
- 24 Visitor surveys suggested that the site attracted a slightly lower retired and higher working population than the Trust average (2020, 2019) and a slightly higher ratio of male to female than the Trust average (2019, 2020, 2021).
- 25 More knowledgeable about this site/ the local area: 2021: 84.1%, 2020: 89.3%, 2019: 88%; More knowledgeable about Scotland's heritage: 2021: 78.3%, 2020: 82.8%, 2019: 77.5%
- 26 While this has decreased in 2020 and 2021, due to the COVID-19 pandemic, the Visitor Survey results for 2019 indicated that the percentage of overseas visitors was twice that of the average for the organisation as a whole (Whole Trust 25.5%, Culloden 52.7%). The site also has a proportionately lower number of visitors who are National Trust for Scotland members (2019 – 25.4% with Whole Trust average 45.6%, 2020 – 28% with Whole Trust average 47.8% and 2021 24.8% with whole Trust average 44.8%).
- 27 <https://canmore.org.uk/site/search/result?SITEYPE=8>
- 28 It is recognised that part of the funding granted for the next two years to stabilise the property is also focused on looking into the future of the site.
- 29 A Historic Buildings Survey for the site is due to be actioned in 2022 but was not completed prior to this Case Study and has not been taken into account.
- 30 Slightly above average for happier (2019 - 68.3%, average 61%), 2021: 56.7% (50.2% average) and relaxed (2019: 68.3% (average 66%) and 56.7% (50.2%). The measure for perceived health is more varied, above average for the Trust in 2021 (23.3%, average 14.8%), not in 2019 (11.1%, average 23.2%).
- 31 I.e. in 2019 and 2021:

	2019 (Total)	2021 (Whole Trust)
A stronger connection to those I was with	34.9% (30.4%)	26.7% (22.8%)
A stronger connection to the place	55.6% (48%)	40% (43.8%)
A stronger connection to the past	60.3% (45.2%)	46.7% (45.8%)
A Stronger connection to the NTS	47.6% (31.8%)	40% (25.1%)
Total	63 (1637)	30 (6431)
- 32 Visitor Surveys numbers from 2020 and 2021 provided only a smaller sample limiting conclusions. In 2019, the sites visitors were slightly more likely to be working full time (echoed in a slightly higher number of visitors in the 25-55 age categories) and a slightly higher number of female visitors than the Trust average were noted.
- 33 <https://www.nts.org.uk/stories/virtual-garden-tour-fyvie-castle-walled-garden> (Accessed 11/03/22); <https://www.youtube.com/watch?v=YKkGRIHZYlw> (Accessed 11/03/22).
- 34 In 2019 57.3% of surveyed visitors to the site identified as National Trust for Scotland members, with the organisational average at 45.6%; In 2021, 50% of the, admittedly small sample size of, 30 surveyed visitors at Fyvie identified as members, with the organisational average at 44.8%.

35 The 88 sites include Head Office and Regional Offices.

36 The Social Value Toolkit highlighted that visitors recognise the historic importance of the site even if the specific details are not known.

37 The Social Values Toolkit highlighted that part of the emotional connection to the House in particular, arose from a sense that it was authentic and hadn't been overly restored.

38 2021: Healthier Newhailes - 15.9%, Whole Trust – 14.8%; Happier Newhailes: 54.5%, Whole Trust 50.2%; Relaxed Newhailes – 53.4%, Whole Trust 53.1%.

39

A stronger connection to those I was with	66.7% (25.8%)	60% (30.4%)	33.4% (22.8%)
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In contrast the site significantly under-scored against the Trust average for those who felt a significantly stronger connection to the place or the past.

40

	2019 (Whole Trust)	2020 (Whole Trust)	2021 (Whole Trust)
To spend quality time alone or with friends or family	70% (50%)	62.5% (48%)	59.6% (40%)
To entertain or occupy children	95% (16%)	62.5% (14.9%)	53.6% (14.4%)

41 I.e. Heritage Fund, 'Space to Thrive Report' (2020), <https://www.heritagefund.org.uk/about/insight/research/space-thrive> (Accessed 09/03/2020); <https://www.hutton.ac.uk/sites/default/files/files/projects/GreenHealth-InformationNote4-Urban-green-space-and-wellbeing.pdf>

42 There is a lift in the house but it currently cannot be used because of fire evacuation procedures. The purchase of Evacuation chairs is being investigated.

43 Visitor survey numbers from 2019 and 2020 were considered too small to allow for comprehensive conclusions to be made.

44 Numbers taken 27.02.22

45

	2020 (Total)	2019 (Total)	2021 (Whole Trust)
More knowledge about site/local area	33.3% (67.6%)	26.7% (66%)	36.9% (66.4%)
More knowledge about Scotland's heritage	16.7% (53.8%)	13.3% (52.8%)	21.9% (50.8%)
More knowledge about NTS	16.7% (21.3%)	0% (26%)	14.1% (22%)

46

	2019 (Whole Trust)	2020 (Whole Trust)	2021 (Whole Trust)
To learn more about the place and its stories	5% (60.1%)	12.5% (62.9%)	32.4% (65.3%)

47 In 2021, with the largest available dataset for Visitor Survey's from the site (629 respondents), the number of respondents who were members (41.8%) was slightly lower than the organisational average (44.8%).

48 The site has a consistently lower number of overseas visitors according to the Visitor Survey (2019 – 0%, 2020-0% and 2021 – 0.8%) although low numbers of respondents in 2019 and 2020 and the impact of the COVID-19 pandemic in 2020 and 2021 must also be taken into account.

49 The 88 sites include Head Office and Regional offices.

50 This included St Mary's University who used the space for learning and the Royal Edinburgh Hospital who used the site as a space for patients when public parks were particularly busy.

51 <https://www.nts.org.uk/stories/redeveloping-the-great-garden-at-pitmedden> (Accessed 10/03/22).

52 While this shift is not necessarily reflected in the Visitor Survey results for Garden sites when compared between 2019 and 2020 there is also a difference in the number of visitors surveyed and the total reflects only Garden-focused sites.

53 Of the 10 sites identified within the Aberdeenshire Visitor Region, Pitmedden was 7th for Visitor numbers in 2019.

54 In 2019, of respondents to the Visitor survey, 56.9% of visitors to Pitmedden were National Trust for Scotland members with 45.6% as the organisational average. In 2020 71.4% (admittedly of only 7 surveys taken) were members, with 47.8% as the organisational average and in 2021, 58.1% of surveyed visitors to Pitmedden were members in comparison to 44.8% as the organisational average.

55 In 2019, prior to the COVID-19 pandemic, 11.2% of visitors surveyed at Pitmedden were overseas visitors compared to an organisational average of 25.5%.

56 Naturalness was defined as the proportion of semi-natural vegetation.

57 Research on this topic includes: <http://publications.naturalengland.org.uk/publication/6476962745024512>; <https://nt.global.ssl.fastly.net/documents/sleep-mood-and-coastal-walking---a-report-by-eleanor-ratcliffe.pdf>; <https://www.nature.com/articles/s41598-019-44097-3> The significant increase in visitor numbers to the site in 2021 (84746, compared to 64091 (2020), 74532 (2019) and 60312 (2018) and this is likely to be linked to increased focus on the wellbeing offered by engagement with the outdoors during the pandemic and it is unclear if this trend will continue in the future.

58 The sample size from Visitor Surveys does not allow for observations to be made about a visitor's desire for learning at the site.

59 It is noted that there is a planned redevelopment at the Nature Centre that would look to increase the learning experience at the site. However, as this is in development it has not been counted within the Rapid Assessment process.

60 I.e. <https://www.visitberwickshirecoast.co.uk/> (Accessed 27/02/2022).

61 Visitor survey numbers are too low to make significant observations related to visitor breakdown, although there is some indication that the average percentage of members on site is below the organisational average.

62 The Sustainable Investment Toolkit (SIT) was created on behalf of the Our Place in Time – Built Heritage Investment Group through an iterative process of consultation and discussion. The SIT, which is (in 2022) undergoing a process of further consultation within the sector, aims to prioritise, enable visualisation around, and clearly communicate decision making for projects involving built heritage assets.

63 It is recognised that this process can [be a very detailed process that sits outwith the feasible time-scope for a Portfolio Review] I.e. Social Values Toolkit. [Workshop not a replacement for far more detailed processes but can sit parallel to them – incorporating this research if it has been developed].

APPENDIX 1A

SUSTAINABLE INVESTMENT TOOLKIT (SIT) – ORIGINAL FRAMEWORK

(DRAFT, Due to be updated and BETA version released for use 2022)

Contents of the Toolkit:

- *Introduction*
- *How To Guide*
- *Principles*
- *Sustainable Investment Tool (SIT)*
- *SIT Project Sheet*
- *Completed SIT Project Sheet (example project)*
- *Completed SIT (example project)*
- *Potential Measures*
- *Glossary*
- *Delivering Value through the Built Heritage Diagram*

Introduction

This Sustainable Investment Toolkit for built heritage has been created on behalf of the Our Place in Time – Built Heritage Investment Group, through an iterative process of consultation and discussion. It aims to enable visualisation around decision making for projects and investment in built heritage. It will help organisations as well as community and interest groups with heritage assets explore sustainability, enabling greater resilience.

It will help prioritise and clearly communicate decision-making by demonstrating the Economic, Cultural, Environmental and Social outcomes of potential investment in built heritage across a range of sixteen categories, tested by the sector. Using the tool can help to clarify where to target applications for external funding.

The wheel visually demonstrates where investment can contribute to national outcomes and key government priorities. The four sections represent the four pillars of sustainability and reflect Scotland's National Performance Indicators, as shown in the 'Delivering Value through the Built Heritage' diagram.

The toolkit is intended to be flexible and can be tailored to suit specific needs – whether for a single smaller project, or a national organisation with many assets. The tool is not intended to be a definitive solution to taking prioritisation and investment decisions. However, the structure it provides can aid communication of the value heritage assets and the related projects can bring across a wide range of indicators, ultimately broadening the understanding of heritage value beyond the cultural quadrant.

The toolkit is intended to be useful across a wide range of users: community groups, asset holders, funders and practitioners – adaptable for all. It should help to start conversations about wider value, advocate for the benefits heritage assets deliver, helping to demonstrate how built heritage contributes to positive outcomes for people across the wellbeing, climate and economic agendas.

How to Guide

The toolkit is designed to be as simple as possible to start using.

How you use it will depend on: who you are (individually and collectively as an organisation/group), what your built environment asset consists of, and what your intended outcomes might be.

Who might be using the toolkit?

You could be from any of the following groups or organisations:

- *Community group*
- *Private sector organisations*
- *Funding Organisation / Grant Giving /Trusts*
- *Local Authority*
- *Heritage Organisation*
- *Asset holder*
- *Professional body*
- *Civic society group*
- *Government Agency*
- *Other*

What might the purpose be for using the toolkit?

- *Advocacy internal to your group or organisation – enabling people within your group or organisation to understand what a project can achieve across a range of areas*
- *Advocacy external - enabling people outwith your group or organisation to understand what a project can achieve across a range of areas*
- *To understand more about your asset/project*
- *Discussion tool – for any group, organisation, or community*
- *Fundraising bid (heritage specific funding – or funding from other areas)*
- *Investment decision making (if you're an organisation owning many assets, you may use this tool to consider asset management across a range of factors)*
- *Other – during the consultation we'll be asking respondents for their ideas for how the toolkit might be used.*

Using the Tool

You could use the toolkit in many ways – the below forms a practical set of steps to consider. Before you start – define both your asset and the purpose of the project.

First – if you're not familiar with the historic built environment have a look at the Principles, these give context to how the historic environment sector considers sustainable investment. You may already be familiar with these aspects, or with Historic Environment Policy for Scotland (HEPS). Documents such as these (and many others) were the starting point for forming the wheel.

Next - look at the Tool, together with the Project Sheet. Read through these – ask questions in relation to how your project might meet some/any/all of the segment descriptions; and at what level they might meet them - low/medium/high.

We've included a fictional example of a completed SIT and a completed SIT project sheet – some users may find this helpful when considering their own project.

As the Sustainable Investment Toolkit is in development, we suggest printing the items out and filling them in by hand; this can be particularly useful if working as a group (you could even compare individual views!). [There are questions in the consultation about how you might want to use the Toolkit (paper, digital, app etc) in the future.]

If you're reading through any part of the Toolkit and have questions about any words or terminology used – please look at the Glossary.

Initially you might want to consider the individual segments quite broadly; if you're doing a detailed analysis of a project, or gaining greater insight into a project, please check the Potential Measures table.

When using the Toolkit we'd suggest you bear the following in mind:

- *Manage Expectations - don't expect any project to meet all segments of the wheel.*
- *The Toolkit aims to encourage common language and understanding of the benefits of heritage assets.*
- *The Toolkit aims to enable all to articulate the reality or potential of a project.*
- *Engage with the toolkit with a sense of proportionality – if you have a small repair project consider that the data and information you may need may be less complex than if you're considering seeking funding from multiple sources for a complex multi-million pound regeneration and development project.*
- *Know that, at times, professional advice and knowledge could be necessary to accurately answer some of the questions that may arise.*
- *Differences of opinion may arise over any particular segment or project. We can acknowledge those differences, explore well-informed opinions, and consider that the broader understanding of the benefits will enable better long-term outcomes for people and place.*

More experienced users may consider:

- **Two Step** – *The Tool can be used to explore the situation an asset is in currently, and then compare this to intended outcomes of any intervention in relation to that asset (the project). This before/after approach can be of use to a range of users.*
- **Weighting** – *Putting emphasis on any particular quadrant or segment and giving this more importance would be considered 'weighting'. Weighting can be applied to the Tool, but that is at the discretion of the user.*

For example: a Community Funder may require areas within Society to be considered as HIGH; whereas a Heritage Funder could require segments within Culture to be considered as HIGH. A Community Group when considering their own project could judge that without HIGH impact in the Economy section their project may not be sustainable in the longer term.

- **Scoring** – *numerical scores could be attached to the low/medium/high values, thereby producing a 'scoring mechanism' for projects. This may be suitable in some instances, or may help with fine details between multiple iterations of potential projects. However, the tool was not designed with this in mind.*
- **Multiple Iterations** – *Should you have several potential projects for an asset the Tool could be run multiple times and comparisons made across the range of potential outcomes.*
- **Multiple Asset Approach** – *The Tool can be used by a multiple asset holder to consider their full estate building by building and aid decisions in relation to management of that estate.*

Principles used in forming the Sustainable Investment Tool:

The Principles for prioritisation of sustainable investment in the Historic Environment

Fundamentals

These are within the Principles and are:

- Not in any order of importance, or implied importance
- Capable of being weighted, dependant on decision-maker values or funder outcomes
- Applied to both an Asset-led approach and a Benefits-led approach
- Adaptable to both the status-quo of an asset and the related potential
- Relatable to projects as well as to assets
- Supportive of wider UN Sustainable Development Goals and the National Performance Framework

Each Fundamental within the Principles is underlined.






The Principles following below should be applied:

Within a construct which sets: deliverability/feasibility, legal/statutory duties, organisational financial need, organisational governance, succession planning, and ownership constraints/onuses, as potential requirements for receiving some avenues of additional resource.

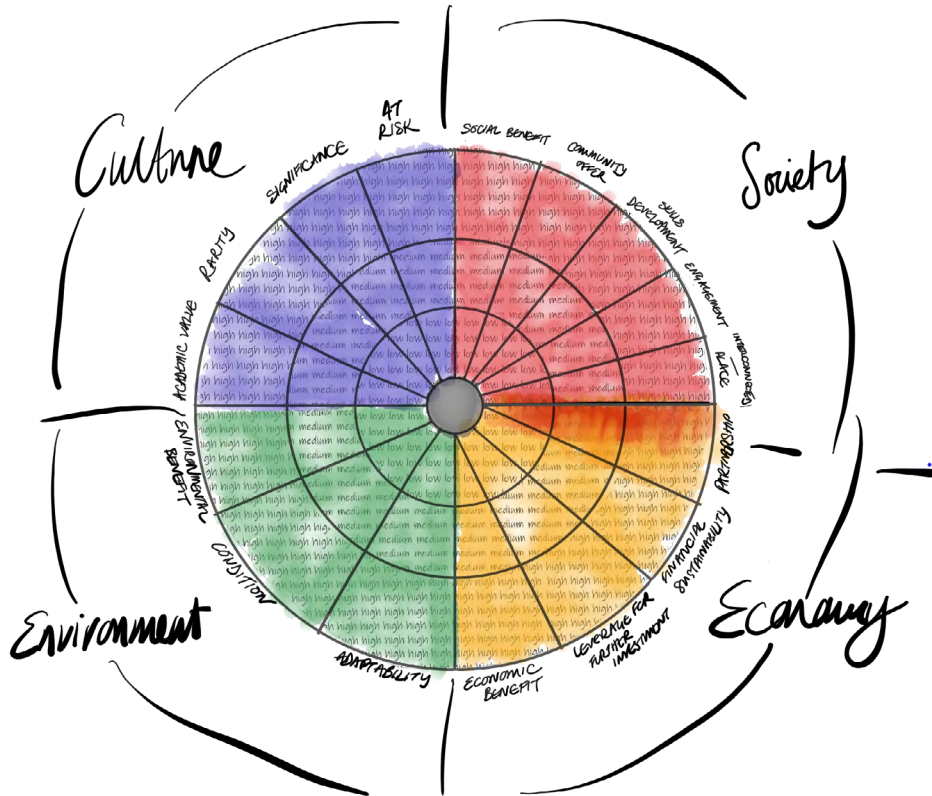
Well managed condition, where assets have been appropriately maintained and cared for, and ongoing active management schemes are to be positively considered.

Principles

By resourcing the historic environment we seek to prioritise those that deliver the greatest range and depth of benefits through:

-  Understanding and valuing the **cultural significance** of the historic environment. Taking into account the academic value, rarity and significance of any asset (or asset as part of a wider project). This should be fully inclusive of social value, and mindful of any current vulnerability/risk.
-  Optimising the potential for the **social benefit** of the historic environment through consideration of the social & community offer/ or service provision of an asset, and the skills development potential of a presented project.
-  Ensuring that environmental sustainability is always enhanced, so negative **environmental impacts** are minimised now and for the future.
-  Encouraging wider **economic benefit** realised through financing and resourcing of the historic environment; recognising the importance of project/asset financial sustainability, and acknowledging the potential for leveraging further investment.
-  Increasing **engagement and inclusivity** through: appropriate alternative use/adaptability of the historic environment, improved accessibility/engagement potential; and through a vision which sees assets and places as interconnected. Rewarding the positive role a variety of engaged stakeholders and partnership and collaborative working can bring to any place or project.

Sustainable Investment Tool - Wheel



Test Project Sheet

Project Title: _____

Project Location: *Rural/Urban Town/City Etc / Simd etc*

Short Project Description: *(Max 200 Words)*

To be used with the Sustainable Investment Tool - wheel

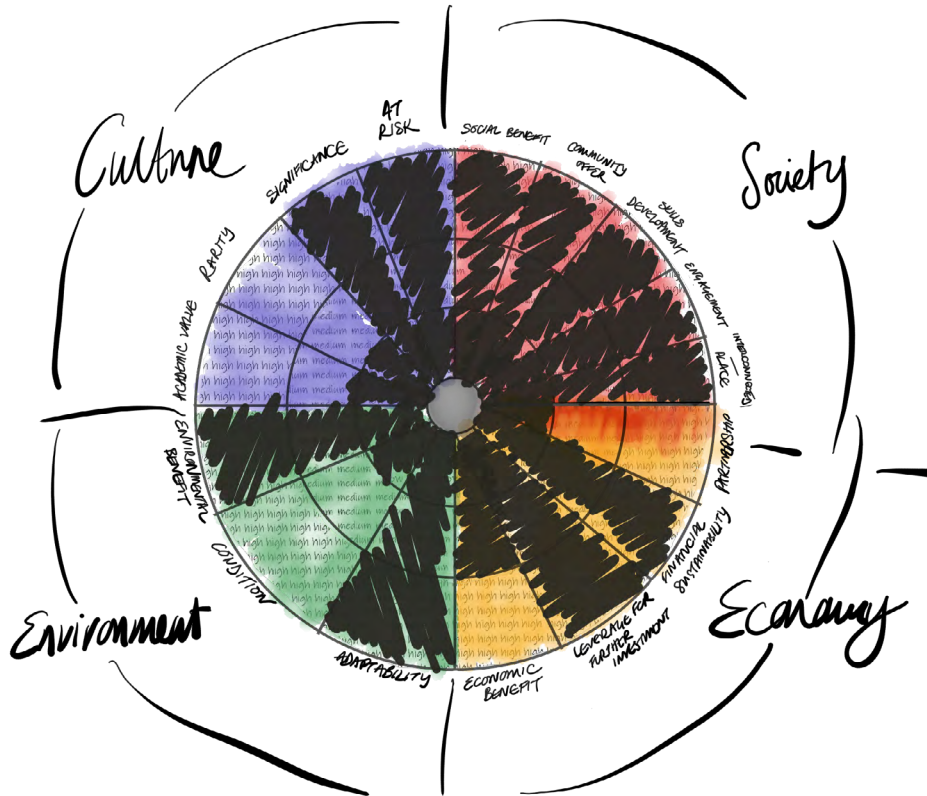
TEST PROJECT SHEET	
PROJECT TITLE	
PROJECT LOCATION - RURAL/URBAN TOWN/CITY ETC / SIMD etc	
SHORT PROJECT DESCRIPTION (MAX 200 WORDS)	

To be used with the Sustainable Investment Tool - wheel

Sustainable Development (Four Pillars)	Value Descriptors	<----- potential for scale: high/medium/low on wheel ----- >	
		positive descriptors HIGH value on the wheel	negative descriptors LOW or not receiving a rating on the wheel
Culture	academic / knowledge value	adds significantly to canon of knowledge and research	little new information to be gained from further exploration
	rarity	rare, complete example, representative (typology under threat)	ubiquitous, multiple changes/additions
	significance	of international importance (national importance/local & community importance)	of no importance at international, national / negligible local & community interest
	vulnerability / at risk	at severe and immediate risk	no specific risk or immediate conservation need identified
Society	social benefit / value	provides social benefits - increased wellbeing, loneliness prevention, work within SIMD areas/populous, inclusivity, inequalities reduced	no social benefits identified or currently understood social value
	community offer / or service provision	many facilities, well used	no facilities or ability to include facilities / active dis-benefit
	skills development	enables development of skills and training	no additional skills benefit to citizens or staff
	engagement	can be easily be accessed / engaged with - in some form	cannot be accessed / engaged with and digital access would either provide no benefit or not be possible
	interconnected asset / place	asset has particular value as part of a group of buildings or a pattern of development and change	asset is stand alone and does not help to demonstrate pattern of change more widely
Economy	partnership potential	appropriate collaborators in place - if necessary	collaboration necessary but not possible
	financial sustainability	fully sustainable - no need to subsidize	no known method to increase sustainability - high need for subsidy
	leverage for further investment	central to locality gaining additional funding and regeneration - will leverage further investment	peripheral/ unimportant to any local projects, regeneration or improvement plans
	economic benefit	adds to economy through employment, tourism, venue, etc	needs extensive financial support - does not provide economic benefit
Environment	environmental impacts / benefit	positive environmental impact	severely damaging to environment
	condition / active management	well maintained -ability to reward good practice and active maintenance procedures	poor active management and condition care
	adaptability / alternate use	can be adapted to suit current and future needs without compromising the asset - and in high-demand	for future use adaptation must occur, but cannot - or zero demand due to location/asset type

Any decision is likely to consider a construct which includes: ownership / legal requirements / capacity / deliverability / feasibility.

Sustainable Investment Tool - Wheel (Sample)



Test Project Sheet (Sample)

Project Title:	Industrial Mill Development
Project Location:	Urban
Short Project Description:	Develop a partially A-Listed Mill Complex into a mix of social housing & affordable housing as well as an arts venue with cafe.

To be used with the Sustainable Investment Tool - wheel

TEST PROJECT - FICTIONAL OR FAMILIAR	
PROJECT TITLE	INDUSTRIAL MILL DEVELOPMENT
PROJECT LOCATION - RURAL / URBAN TOWN/CITY ETC / SIMD etc	URBAN
SHORT PROJECT DESCRIPTION (MAX 200 WORDS) DEVELOP A PARTIALLY A-LISTED MILL COMPLEX INTO A MIX OF SOCIAL HOUSING & AFFORDABLE HOUSING AS WELL AS AN ARTS VENUE WITH CAFÉ.	

To be used with the Sustainable Investment Tool - wheel

Sustainable Development (Four Pillars)	Segment Descriptors	<----- potential for scale: high/medium/low on wheel ----->	
		positive descriptors HIGH value on the wheel	negative descriptors LOW or not receiving a rating on the wheel
Culture	academic / knowledge value	plenty of these exist	new information to be gained from further exploration LOW
	rarity	NOT RARE	ubiquitous, multiple changes/additions LOW
	significance	high - A LISTED	of no importance at international, national / negligible local & community interest
	vulnerability /at risk	high - ON BUILDINGS AT RISK REGISTER	conservation need identified BARE
Society	social benefit / value	high - COMMUNITY HOUSING NEED IDENTIFIED	not identified or currently understood social value
	community offer / or service provision	high - COMMUNITY FACILITIES NEEDED	to include facilities / active dis-benefit
	skills development	high - TRADE SKILLS DEV. AS PART OF PROJECT	skills training for citizens or staff
	engagement	high - LOCAL COMMUNITY ALREADY ENGAGED - GOOD	and digital access would be available ALREADY ACCESS AVAILABLE
	interconnected asset / place	high - potential for future projects + further positive change	to demonstrate pattern of change more widely
Economy	partnership potential	med - 2 partners agreed but more are necessary	collaboration necessary but not possible
	financial sustainability	high - good business plan in place for sustainable financial model	not sustainable - high need for subsidy
	leverage for further investment	high - more of the area could be utilised	performance of other projects, regeneration or improvement plans
	economic benefit	med - good employment opportunities BUT high costs to development	does not provide economic benefit
Environment	environmental impacts / benefit	high - positive impact on building + area	no impact on environment
	condition / active management	low - currently in poor condition - additional cost	poor condition - additional care
	adaptability / alternate use	high - suitable for many uses and can be adapted	for future use adaptation must occur, but cannot - or zero in high-demand type

Any decision is likely to consider a construct which includes: ownership / legal requirements / capacity / deliverability / feasibility.

Definitions And Suggested Measurables In Relation To The Sustainable Investment Tool

Sustainable Development	Criteria	Potential for scale (for matrix deliverable)		Definition	Suggested Measurables
<i>(Four Pillars)</i>		positive descriptors	negative descriptors		
Culture	academic value	adds significantly to canon of knowledge and research	little new information to be gained from further exploration	Adding to the canon of knowledge and research, increasing understanding	Informed by: local and community appreciation of significance, designation status, interest from academic perspectives, place perspectives.
	rarity	rare, complete example, (typology under threat)	ubiquitous, multiple changes/ additions	Not found in large numbers and so of interest or value	
	significance	of international importance (national importance/ local & community importance)	of no importance at international, national / negligible local & community interest	Cultural significance means aesthetic, historic, scientific, social or spiritual value for past, present or future generations. Cultural significance is embodied in the place itself, its fabric, setting, use, associations, meanings, records, related places and related objects	
	vulnerability / at risk	at severe and immediate risk	no specific risk or immediate conservation need identified	Exposed (someone or something valued) to danger, harm, or loss	
Society	social benefit / value	provides social benefits - increased wellbeing, loneliness prevention, work within SIMD areas/ populous, inclusivity, inequalities reduced	no social benefits identified or currently understood social value	Provides wider societal benefits - such as increased wellbeing, loneliness prevention, work within SIMD areas, inclusivity, inequalities reduction, etc	Rapid Evaluation Research Project Tool for measuring social aspiration
	community offer / service provision	many facilities, well used	no facilities or ability to include facilities / active dis-benefit	Providing a service; services could be church/ canal, etc. use could be a home, also functional use such as cinema, office	Provides a service to the community
	skills development	enables development of skills and training	no additional skills benefit to citizens or staff	The process of (1) identifying your skill gaps, and (2) developing and honing these skills	Human Capital Indicator Tool
	engagement	can be easily be accessed / engaged with - in some form	cannot be accessed / engaged with and digital access would either provide no benefit or not be possible	The quality of being able to be reached or entered; the quality of being easy to obtain or use; the quality of being easily understood or appreciated	Scotland's Urban Past, ScARF Understanding and Knowledge Tool (Scotland Archaeological Research Framework)

Sustainable Development	Criteria	Potential for scale (for matrix deliverable)		Definition	Suggested Measurables
Society (continued)	interconnected asset / place	asset has particular value as part of a group of buildings or a pattern of development and change	asset is stand alone and does not help to demonstrate pattern of change more widely	The linking of constituent parts	GIS Tool (Local Development Plan + Place Principle)
Economy	partnership	appropriate collaborators in place - if necessary	collaboration necessary but not possible	In which two or more individuals/organisations pool money, skills, and other resources, and share profit and loss in accordance with terms of the partnership agreement. In absence of such agreement, a partnership is assumed to exist where the participants in an enterprise agree to work collective for the same aims	Number and variety of partners involved
	economic benefit	adds to economy through employment, tourism, venue, etc	needs extensive financial support - does not provide economic benefit	Benefits that can be quantified in terms of money generated, such as net income, revenues, etc.; it can also be money saved when discussing a policy to reduce costs	Human Capital Indicator Tool (Scottish Index of Multiple Deprivation; Empty Homes Data)
	leverage for further investment	central to locality gaining additional funding and regeneration - will leverage further investment	peripheral/ unimportant to any local projects, regeneration or improvement plans	To use something that you already have in order to achieve something new or better	GIS Tool (SIMD + Vacant and Derelict Land Data)
	financial sustainability	fully sustainable - no need to subsidise	no known method to increase sustainability - high need for subsidy	The assessment that a project [or asset] will have sufficient funds to meet all its resource and financial obligations [in the longer-term], whether the funding continues or not	Conservation Management Strategy; Funding Plan
Environment	environmental impacts	positive environmental impact	severely damaging to environment	An environmental effect is the result of environmental impacts on human health and welfare. The term is also used synonymously with environmental impact	Carbon Footprint Calculator
	condition	ability to reward good practice and active maintenance procedures	poor active management and condition care	The state of something with regard to its appearance, quality, or working order	Buildings at Risk Register; Scottish House Condition Survey; Energy Performance Indicators
	alternate use / adaptability	can be adapted to suit current and future needs without compromising the asset - and in high-demand	for future use adaptation must occur, but cannot - or zero demand due to location/asset type	Changing a place to suit the existing use or a proposed use	GIS Tool (Opportunity Zone in National Planning Framework)

Glossary For Sustainable Investment Tool & Principles

Term	Definitions - for the purposes of the document	Notes	Source
Academic Value	Adding to the canon of knowledge and research, increasing understanding.		
Accessibility	<p>The quality of being able to be reached or entered.</p> <p>The quality of being easy to obtain or use.</p> <p>The quality of being easily understood or appreciated.</p>	access here can be physical where possible, but also digital if applicable	Dictionary
Adaptation	Adaptation means changing a place to suit the existing use or a proposed use.		BURRA Charter
Asset	An item of property owned by a person or company, regarded as having value.	<p>value here could be financial, academic, social, cultural.</p> <p>An asset is a building, monument, site, place, area or landscape identified as having cultural significance.</p>	<p>Dictionary</p> <p>HES</p>
Climate Change	Means a change of climate which is attributed directly or indirectly to human activity that alters the composition of the global atmosphere and which is in addition to natural climate variability observed over comparable time periods.		UN Framework Convention on Climate Change
Collaborative	Produced by or involving two or more parties working together.		Dictionary

Term	Definitions - for the purposes of the document	Notes	Source
Community	<p>A group of people living in the same place or having a particular characteristic in common. A particular area or place considered together with its inhabitants. The people of a district or country considered collectively, especially in the context of social values and responsibilities.</p> <p>The condition of sharing or having certain attitudes and interests in common.</p>	<p>HES - A community is a group of people connected by location or by a common interest.</p> <p>community of place A community of place, or place-based community, is a group of people connected because of where they live, work, visit or otherwise spend a large amount of time. It can also refer to a group of people related to a particular geographic location.</p> <p>communities of practice and interest Communities of practice are groups of people who share a concern or a passion for something they do, such as members of a club, professional bodies, associations and institutes. A community of interest is a group of people who identify with or share a similar interest or experience – for instance, young people leaving care, vulnerable adults, the local business community, those with protected characteristics such as disabled people, or people from black and minority ethnic communities.</p>	Dictionary & HES
Condition	The state of something with regard to its appearance, quality, or working order.		Dictionary
Cultural Significance / Significance	<p>Cultural significance means aesthetic, historic, scientific, social or spiritual value for past, present or future generations.</p> <p>Cultural significance is embodied in the place itself, its fabric, setting, use, associations, meanings, records, related places and related objects.</p>	The term cultural significance is synonymous with cultural heritage significance and cultural heritage value. Cultural significance may change over time and with use. Understanding of cultural significance may change as a result of new information.	BURRA Charter & HES
Deliverability	Something that can be done, especially something that is a realistic expectation.		Dictionary

Term	Definitions - for the purposes of the document	Notes	Source
Decision Makers	A decision-maker for the historic environment is anyone who has a role or interest in making decisions that might affect it. Decision-makers in this context could refer to individuals, public and private sector organisations, communities, local authorities, owners or developers.		HES
Economic Benefit	Economic benefits are benefits that can be quantified in terms of money generated, such as net income, revenues, etc. It can also be money saved when discussing a policy to reduce costs.	These benefits can be specific to a project or asset but can also be wider economic benefits for a place or community.	
Financial Sustainability	The assessment that a project [or asset] will have sufficient funds to meet all its resource and financial obligations [in the longer-term], whether the funding continues or not.	More broadly: Economic sustainability refers to practices that support long- term economic growth without negatively impacting social, environmental, and cultural aspects of the community.	Cultural & Economic Impacts on the Information Society
Engage	<p>Occupy or attract (someone's interest or attention).</p> <p>Involve someone in (a conversation or discussion).</p> <p>Participate or become involved in. Establish a meaningful contact or connection with.</p>		Dictionary
Environmental Impacts / Effects	An environmental effect is the result of environmental impacts on human health and welfare. The term is also used synonymously with environmental impact.	This could also include consideration of 'resource use', 'waste' and carbon footprint calculations.	OECD
Feasibility	The state or degree of being easily or conveniently done.		Dictionary
Fundamental	A central or primary rule or principle on which something is based.		Dictionary
Heritage	Heritage can mean different things to different people. It can be anything from the past that you value and want to pass on to future generations.		NL-HF definition

Term	Definitions - for the purposes of the document	Notes	Source
Historic Environment	Scotland's historic environment is the physical evidence for human activity that connects people with place, linked with associations we can see, feel and understand.		HES definition OPiT
Implement	Put (a decision, plan, agreement, etc.) into effect.		Dictionary
Inclusivity	The practice or policy of including people who might otherwise be excluded or marginalized, such as those who have physical or mental disabilities and members of minority groups.		Dictionary
Impact	The effect of changes on the historic environment is often referred to as the impact. This can be positive or negative. There can be an impact on the physical elements of a place as well as on the setting of a place, changing its surroundings so that our understanding and appreciation is altered.		HES
Interconnected	The linking of constituent parts.	In this case both a spatial and cultural understanding can be brought to bear.	Dictionary
Investment	An act of devoting time, effort, or energy to a particular undertaking with the expectation of a worthwhile result.	Also: A thing that is worth buying because it may be profitable or useful in the future.	Dictionary
Leveraging	To use something that you already have in order to achieve something new or better.	Used here financially, but could equally apply to skills and capacity.	Dictionary
Methodology	A system of methods used in a particular area of study or activity.	Method: a particular procedure for accomplishing or approaching something, especially a systematic or established one.	Dictionary
Ownership	The act, state, or right of possessing something.		Dictionary
Partnership	Partnership - in which two or more individuals/organisations pool money, skills, and other resources, and share profit and loss in accordance with terms of the partnership agreement. In absence of such agreement, a partnership is assumed to exist where the participants in an enterprise agree to share the associated risks and rewards proportionately.	The less formal definition is a more likely scenario: partnership is assumed to exist where the participants in an enterprise agree to share the associated risks and rewards proportionately.	Business Dictionary

Term	Definitions - for the purposes of the document	Notes	Source
Place	Place means a geographically defined area. It may include elements, objects, spaces and views. Place may have tangible and intangible dimensions.	Place has a broad scope and includes natural and cultural features. Place can be large or small: for example, a memorial, a tree, an individual building or group of buildings, the location of an historical event, an urban area or town, a cultural landscape, a garden, an industrial plant, a shipwreck, a site with in situ remains, a stone arrangement, a road or travel route, a community meeting place, a site with spiritual or religious connections.	BURRA Charter
Principle	A fundamental truth or proposition that serves as the foundation for a system of belief or behaviour or for a chain of reasoning.		Dictionary
Prioritisation	The action or process of deciding the relative importance or urgency of a thing or things.		Dictionary
Project	An individual or collaborative enterprise that is carefully planned to achieve a particular aim. A proposed or planned undertaking.	This could be anything from a multimillion pound project over several years, to a building repair. Within these documents it is used to mean all related actions and activities that take place to achieve a desired outcome.	Dictionary
Protection	The act of protecting, or the state of being protected; preservation from injury or harm.		Dictionary
Service Provision	Here used to mean 'providing a service'.	Service could be widely defined from local shop to canal depending on the asset in question.	
Skills Development	Skills development is the process of (1) identifying your skill gaps, and (2) developing and honing these skills.	These could be skills for the heritage workforce or individuals and groups involved with a project or asset. The skills may/may not be heritage focused depending on the need.	
Social Benefit	Provides wider societal benefits - such as increased wellbeing, loneliness prevention, work within SIMD areas, inclusivity, inequalities reduction etc	Other definitions include: What contribution to society do community projects, investments and mainstream businesses make?	

Term	Definitions - for the purposes of the document	Notes	Source
Social Value	Social value: refers to the significance of the historic environment to contemporary communities, including people's sense of identity, belonging, attachment and place.	More research by University of Stirling may inform this definition.	Informed by Elizabeth Robson's research. Historic England's definition, Prof. Sian Jones and others.
Stakeholder	A person with an interest or concern in something.	The interest often implies a financial or resource involvement.	Dictionary
Strategy	A plan of action designed to achieve a long-term or overall aim.		Dictionary
Sustainable	Able to be maintained at a certain rate or level.		Dictionary
Sustainable Development	Meets the needs of the present without compromising the ability of future generations to meet their own needs.		World Commission on Environment and Development (WCED), Brundtland Commission
Transparent	Easy to perceive or detect.		Dictionary
Use	Use means the functions of a place, including the activities and traditional and customary practices that may occur at the place or are dependent on the place. Compatible use means a use which respects the cultural significance of a place. Such a use involves no, or minimal, impact on cultural significance.	Use includes for example cultural practices commonly associated with Indigenous peoples such as ceremonies, hunting and fishing, and fulfilment of traditional obligations. Exercising a right of access may be a use.	BURRA Charter
Vulnerability/ risk	Exposed (someone or something valued) to danger, harm, or loss.	Implication here of imminent risk.	Dictionary
Wellbeing	The indicators for wellbeing are: safe, healthy, active, nurtured, achieving, respected, responsible and included. Acronym: SHANARRI		Scottish Government

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

- EXECUTIVE SUMMARY
- 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

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.

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Insights

Values Framework