PORTFOLIO REVIEW

Insights, Values & Evaluation

BEFS
BUILT ENVIRONMENT FORUM SCOTLAND

NATIONAL TRUST for SCOTLAND

CONTENTS

ABSTRACT

The Portfolio Review, undertaken by BEFS in partnership with the National Trust for Scotland, examines the Trust portfolio. Looking at what the Trust owns, how it is used, and what benefits can be realised for the future. Within this process a holistic framework, based on Trust data and knowledge, was developed to show those values, ultimately providing a simple visualisation of complex data and understanding.

From establishment in the 1930s, the Trust has worked towards the fulfilment of its statutory purpose; to care for, and provide access to, sites of cultural and natural interest and beauty within Scotland.

Priorities for acquisition have varied over time, often reacting to changing circumstances and rarely limited by a concise acquisition strategy. Disposals from the portfolio have been relatively few and subject to greater interrogation. This has resulted in the provision of multiple sites across a wide range of heritage and geography. This report reaffirms the variety and uniqueness of the estate. The NTS also has mature systems of property evaluation, through Significance Statements. At its properties a wide variety of management mechanisms are adopted to support and achieve Trust aims.

The Trust continues to be committed to the acquisition of property, although the rate of acquisitions has slowed significantly in recent years. In this review, the current acquisition policy is placed within the context of similar organisations.

This suggests that a revision is necessary to consider explicit inclusion of social and environmental factors, as well as cultural considerations, for future acquisition.

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

The Portfolio Review serves as a tool both to inform a revised acquisition policy, and to reconsider – though a new framework - what is already held. Previous assessments have highlighted the importance of a solid knowledge base, understanding of the role of significance, as well as considering the variety of stakeholders and values acting on the organisation.

Whilst detailed work examined the Built Estate, providing analysis not only of what is held, where they are located, and how they are used; but also highlighting strengths and weaknesses. It is of note that the work relating to Trust portfolio data, and Management options is pertinent across all holdings. The broader remit of this Review will establish the opportunities properties represent to enhance delivery of the new strategic framework, ensuring that the Trust is more resilient and relevant for the future.

WHY WE OWN PROPERTY

ESTABLISHED PURPOSE & RENEWED VISION

In 1931, the National Trust for Scotland was established, and confirmed by Act of Parliament in 1935

for the purposes of promoting the permanent preservation for the benefits of the nation of lands and buildings in Scotland of historic or national interest or natural beauty... as regards buildings for the preservation (so far as practicable) of their architectural or historic features and contents so far as of national or historic interest.[1]

In 1938 it was further clarified that the purpose of the National Trust for Scotland should be threefold:

- **A** *'The preservation of buildings of architectural or artistic interest and places of historic or national interest or natural beauty and the protection, improvement and augmentation of the amenities of such buildings and places and their surroundings*
- **B** *The preservation of articles and objects of any description having artistic or antiquarian interest*
- **C** *The access to and enjoyment of such buildings, places, articles and objects by the public'*[2]

One of the ways in which the Trust delivers its charitable purpose is through the owning and managing of property. Whether protecting significant heritage from loss; giving the Trust a legitimate voice; providing spaces to engage with visitors and communities; and generating support and income.

The totality of the properties and collections form The Portfolio. The purpose of the Portfolio is to enable the Trust to balance outcomes, to give genuine scale of impact, and to contribute to the telling the range and breadth of stories across Scotland, today and for the future.

This purpose has been reaffirmed through the 2022 Vision, 'Nature, Beauty and heritage for everyone', with Strategic Aims, focused on Conservation, Engagement and Sustainability [Fig 1].

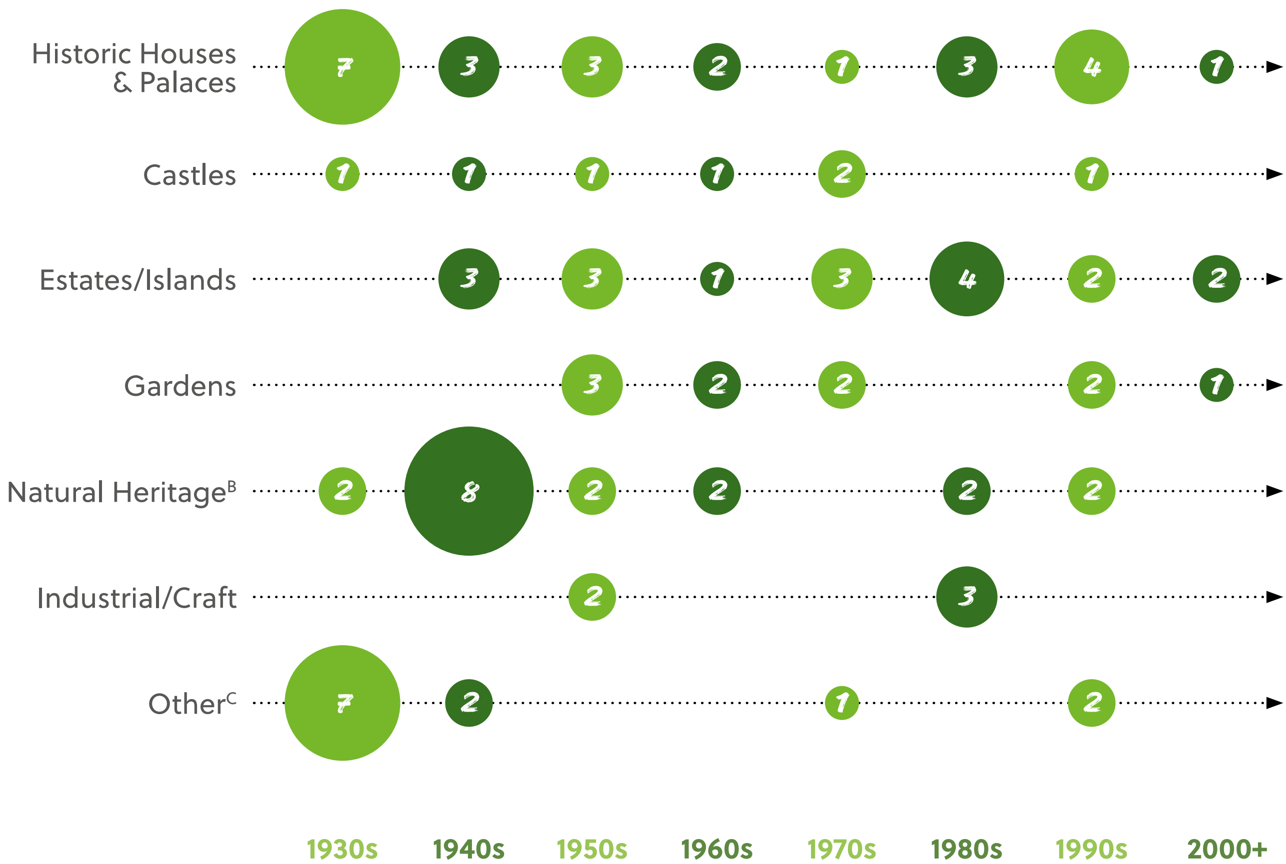
The Trust recognises the continuing need to respond to a changing world, the Portfolio Review is part of that process.

WHAT WE HAVE

Historic acquisitions have reflected changing social and economic circumstances or key governmental policies.

Initiatives such as Country House Scheme (1942) led to a significant increase in the number of 'country house' properties in the Trust's care, and the Little Houses Improvement Scheme (LHIS, 1960 on), took advantage of the Housing Act of the previous year to purchase, restore and then sell architecturally significant 'little houses' with the aid of improvement grants.

Acquisition Dates for the Visited Properties in the Current Portfolio (2022)[A]



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

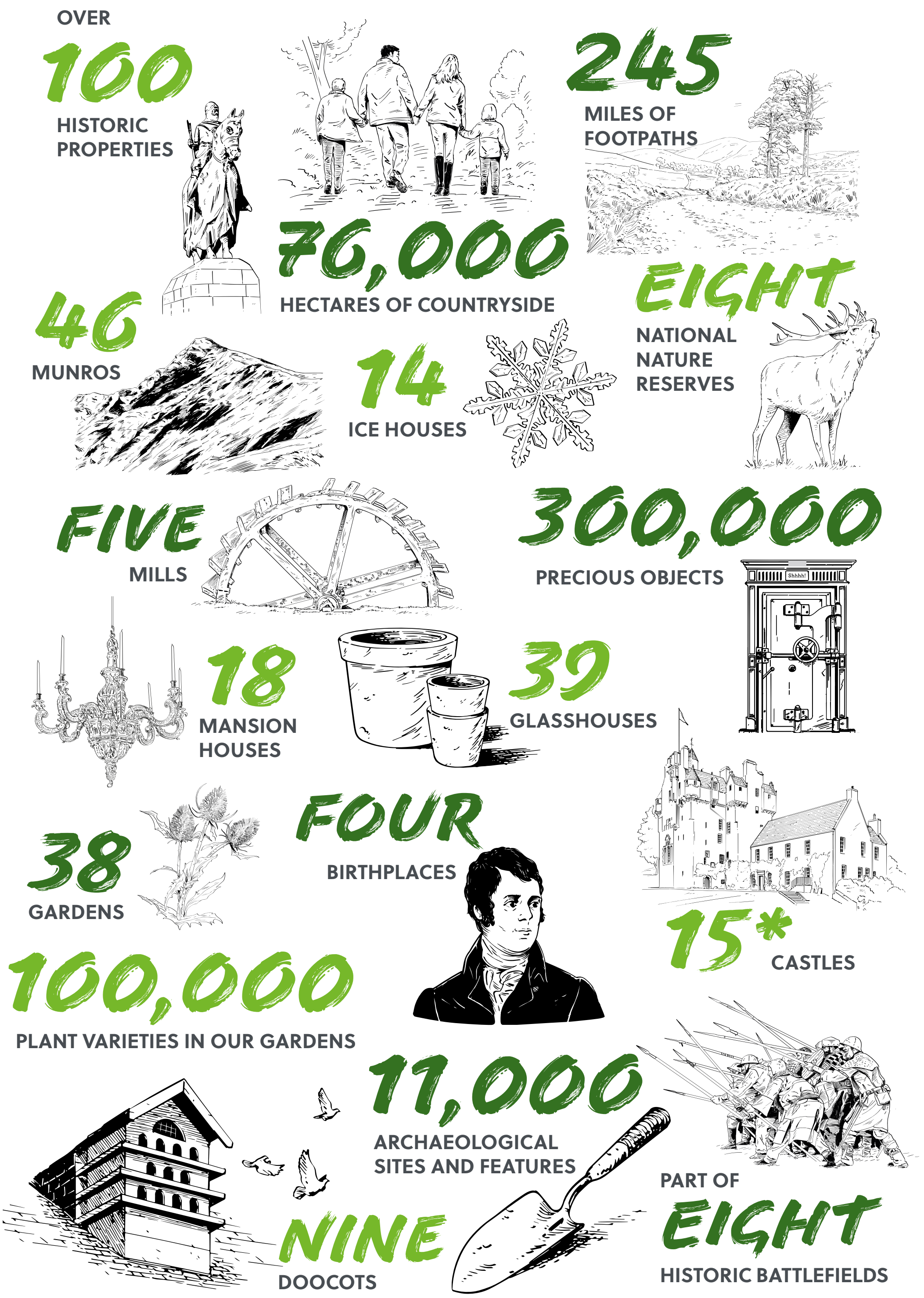
B Within these categories, Natural Heritage Properties are those in which the focus of the property is deemed to be on natural, rather than built, heritage. Estates and Islands have been classified separately as they commonly include both a natural and built heritage focus.

C This category includes memorials, battlefields and religious sites.

Whilst we can have awareness of some trends, such as deindustrialisation during the 1970s leading to an increased interest in, and availability of, industrial heritage, resulting in the acquisition of Robert Smail's Print Works in 1986 and Barry Mill in 1988. The 2000s focused resources on existing Trust sites, rather than acquisition. Significant projects included the re-interpretation of the Robert Burns Birthplace Museum (2008), the new visitor centre at Bannockburn (2014) and the Hill House Box (2018/2019).[3]

The table above does not highlight any particular pattern, emphasising that the portfolio developed organically, particularly in the organisations' early years. Acquisitions could be made based on personal connections or happenstance; with an understandable desire to respond positively to the generosity of potential doners.

Today, the portfolio is extensive and varied:



Totals quoted reflect understanding as of March 2022.

*Includes castles under Guardianship Agreement

HOW WE MANAGE OUR PROPERTIES

Management is how the Trust describes various forms of interaction with properties.

From being the owner and occupier, running a visited property; to letting land and properties for commercial reasons; the Trust can own, run, lease, manage, and hold agreements over land and properties in a variety of ways. The benefits and challenges of these different management structures are reviewed as part of this process.

VISITED PROPERTIES

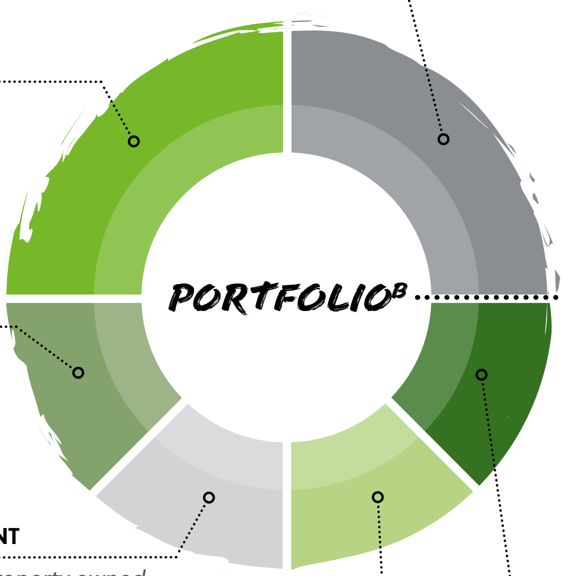
- *Includes Free & Pay to Entry sites*

COMMERCIAL AGREEMENTS

- *Leased for residential, agricultural or commercial use*

LETS FOR PURSUANCE OF CHARITABLE PURPOSE

- *Leased at below market value to tenants expected to fulfil requirements linked to the Trust's charitable purpose*



MAINTAINS INTEREST IN:

CONSERVATION AGREEMENT[A]

- *Impose conditions on title of land not owned by the Trust*
- *Binds successor of the title in perpetuity*
- *Increasingly highly specific and underpinned by understanding of site's significance*

TRUST AS TENANT

- *Tenants of a property owned by another organisation*
- *Property supports Trust's purpose and vision*

GUARDIANSHIP AGREEMENT

- *Trust owns registered title to land*
- *All aspects of site management conducted by Historic Environment Scotland (HES)*

PRIVATE MANAGEMENT AGREEMENT

- *Between the Trust and a specified organisation*
- *One organisation cares for a property on behalf of the other*

A Within this Portfolio Review, Conservation Agreements is utilised as a general term covering Conservation Agreements as established by Act of Parliament in 1938, Conservation Burdens as established in 2003 in the Title Conditions (Scotland) Act 2003, Preserved feudal burdens (post-2000) converted into Conservation Burdens.

B This graphic is a visual representation of the estate and does not correlate directly with the number of assets covered by each Management Agreement.

Disposal restrictions exist on many of the properties within the Trust's care. There are two main forms, which can inter-relate, which include:

1. *Restrictions applied by the donor or funder when the ownership of the property was transferred. These commonly state that the property cannot be released from the Trust's portfolio without the funder's consent.*
2. *The Trust's ability to declare it's sites as inalienable. In Scotland, this power is unique to the Trust and is aimed at preserving the long-term future of a property.[4]*

These restrictions can influence prospective donors, as well as playing a role in influencing local planning.

CURRENT MANAGEMENT OPTIONS FOR DELIVERING CHARITABLE AIMS

Future acquisitions can be considered in-light of the range of management options already undertaken by the Trust.

When considering future management options, many factors come into play. The Values Framework trialled as part of this review (and discussed in detail later in this report, and as part of the) can help assess these management options, supporting the development of the existing, and future, Portfolio.

RESTRICTIONS ON MANAGEMENT OPTIONS

Trust sites can have existing restrictions which preserve elements of the site from significant change. These include:

- *Designations: Applied by HES or NatureScot.*
- *Inalienability: If declared inalienable, the Trust does not have the power to dispose of:*
    - *(i) the principal mansion house of the site, or it's closely linked assets*
    - *(ii) land over 20 acres without permission from Scottish Ministers*
- *Restrictions when donated: Some sites also had restrictions on disposal placed on them when they were donated or acquired, either by donors or funders.*

EVALUATION OF CURRENT MANAGEMENT OPTIONS & THEIR POTENTIAL FOR THE FUTURE

Visited Properties: as these are the conventionally understood interaction between the Trust and members of the public (as well as Members) they tend to have been assessed through multiple Trust areas of knowledge, such as commercial assessment, visitor satisfaction understanding, educational offers, as well as statements of significance. They are often (though not exclusively, as is seen below) owned and managed by the Trust.

1. Commercial Let Estate

The leased estate is very varied, including commercial leases (covering sporting leases, retail, telecoms masts, gardens and more), residential leases (including tenancies, staff lets, tied housing), agricultural leases, and crofting leases. In the case of agricultural tenancies under the 1991 Agricultural Holdings Act, or crofting tenancies, these give the tenants security of tenure, can be passed on to family members, and control cannot be readily resumed by the Trust. These tenancies also give the land manager significant freedom to manage the land to meet their own objectives. Other, smaller areas of farmland within the Trust portfolio are let on a short-term basis.

The let estate makes a significant financial contribution to the Trust with figures (excluding Holiday Lets) for 2021-2022 at almost £1.8M. Public access to leased buildings can be limited by the terms of the lease. Access to leased land remains subject to the normal access rights set out in the Land Reform (Scotland) Act (2003).

The let estate can also have a substantial impact on the surrounding landscape of the Trust's visited properties. It also has the potential to act as a significant asset for fulfilling the Trust's environmental aims through the influence, and legal requirements, the Trust has as a landlord.

Future acquisitions can be considered in light of the range of management options already under consideration by the Trust.

2. Let Estate for the Fulfilment of the Trust's charitable purpose

For example, Provan Hall (leased to Glasgow City Council, in process of sub-letting to Provan Hall Community Management Trust)

Sites leased for this reason support the Trust's statutory purpose. This is either through the preservation of a culturally significant site, or by encouraging a level of investment, and access to funding streams, that would not be currently possible under Trust ownership. There is the potential to increase access to a site and to draw about the knowledge, particularly local knowledge, of the tenant.

While these sites do not contribute substantially to the financial sustainability of the Trust, as they are generally entered into for significantly reduced or zero rent, they are also likely to require little economic input from the Trust once an initial lease has been negotiated.

The Trust could monitor leases and property condition more fully, to ensure compliance with the organisation's charitable purpose.

The Trust could monitor leases and property condition more fully, to ensure compliance with the organisation's charitable purpose. Beyond that, there is the potential to take a passive role but also to engage with a site and any community, looking to support ongoing activity utilising the Trust's existing expertise.

3. Private Management Agreements

For example, Preston Tower & Doocot (Agreement with East Lothian Council and Viewpoint Housing Association)

The Trust has only a small number of Private Management Agreements in place. Management Agreements allow the Trust to contribute expertise and support; when within the terms of the Agreement, this is judged to be effective.[5] These can support an 'arms-length' method for the delivery of the Trust's strategic aims with another party taking on the shared responsibility for maintenance of, or access to, the site.

Agreements can also be reviewed if all the partners are amenable, and do not need to include time restrictions, reacting to the developing needs of the site.

4. Trust as tenant

For example, Pollok House, leased from Glasgow City Council

The Trust can also act as the tenant of specific sites which support the delivery of the organisation's strategic aims.

There is the potential for tenancies to vary according to the lease that is in place, and this will directly impact the management control and initiative that the Trust can have at a particular site. If leases are long-term, it is recognised that organisational interests and priorities in a site may shift.

Funding for the site can be provided by the landlord in return for the Trust's management of the site. The level of engagement between the Trust and the landlord organisation can also vary and is often strongly influenced by the funding structure that is in place, as well as whether there are other revenue streams that might be available to the Trust on the site.

It is recognised that sustaining relationships with landlord organisations requires resources (time) to ensure effectiveness.

5. Guardianship Agreements

These are predominantly inherited from previous owners. The Trust holds the registered title to land, but all aspects of site management and control are conducted by Historic Environment Scotland (HES). The normal breakpoint for a Guardianship Agreement is when the current owner dies and the new owner can decide whether or not to renew the agreement. For the Trust as an organisation there is no such breakpoint.

HES also have a commitment to preserve and provide access to the sites under their care, but specific site priorities and funding streams may differ between the two organisations. Some sites held under Guardianship Agreement are self-contained sites but others, notably Castle Campbell, Threave Castle and Scotstarvit Tower, are located within or alongside land that is directly managed by the Trust.

CONSERVATION AGREEMENTS

Used here as a general term covering:

- *Conservation Agreements as established by Act of Parliament in 1938*
- *Conservation Burdens as established in 2003 in the Title Conditions (Scotland) Act 2003*
- *Preserved feudal burdens (post-2000) converted into Conservation Burdens*

Conservation Agreements impose conditions on the title of land not owned by the Trust, binding the owners and their successors in perpetuity. The Trust currently maintains an interest in between 400 and 500 Conservation Agreements although the exact total is unconfirmed.[6]

There has been recent interest in Conservation Agreements both within the Trust, and in the wider sector.[7] Internally, interest has focused on their potential as an alternative to acquisition, allowing an extension of the organisation's statutory purpose, particularly in combatting the climate and biodiversity crisis.[8]

It is recognised that any new Conservation Agreements must be strictly site-specific and underpinned with strong Statements of Significance. Within Scots Law, there is the provision for Conservation Agreements to be challenged by a landowner; parties within a Conservation Burden can apply to the Lands Tribunal for a modification or discharge of the burden if this is considered reasonable.[9] However, this is a process that takes time and expectations around the schedule for establishing Conservation Agreements needs to be managed.

In wider discussions around Conservation Burdens, there has been an assumption that 'Responsible Bodies', of which the Trust is one, will maintain their monitoring role both to uphold their individual remits as bodies with conservation interest and because would be held accountable by a wider interested public.[10] While the Trust has only limited resources, if Conservation Agreements were to be increasingly used, it is likely that there would be increased scrutiny on the mechanism. It is strongly suggested that before the Trust looks to any expanded use of Conservation Agreements the organisation should ensure there is a full understanding of the current Agreements in place. Resources may need to be allocated for the monitoring of current and future Conservation Agreements.

Conservation Agreements and Burdens: only effective if enforced. The Trust cannot expand current 'offer' and explore this avenue without knowing where the Trust could be open to reputation risk

As the understanding of preferred and effective conservation methods, for both built, and natural assets evolves, there needs to be a recognition that Conservation Agreements may also need to adapt, without undermining their value as agreements for perpetuity.[11]

It would be useful to establish if other Responsible Bodies have used this option. Indeed, talking to Responsible Bodies of Conservation Agreements, is also likely to increase shared co-operation regarding this mechanism, both in their establishment and monitoring. Co-operation would have the potential to enhance understanding of significance and to ensure that sites in close proximity had Agreements working to similar ends.[12] Discussions have already taken place between the Trust and the National Trust who are interested in the Trust's experience and evolving practice.

HOW WE ASSESS WHAT WE HAVE

PORTFOLIO REVIEW IN CONTEXT

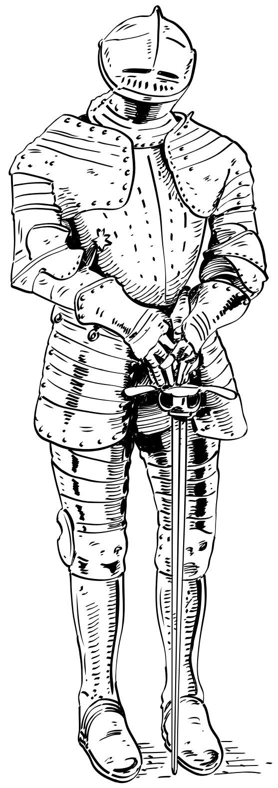
A previous review of the portfolio (2012) intended to map the organisation’s whole estate and enable ‘further development on a prioritised basis to advance the strategic plan as it affects each property.’[13] Current learnings, and wider societal developments in the last decade have significantly impacted this process and have ensured that a direct replication was not desirable.[14]

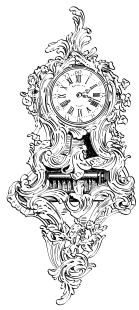
The Review (2012) assigned significance on an assessment of four values (aesthetic, historic, scientific, and social), although it was recognised that expressions of value change.[15] It was acknowledged that the methodology used in 2012 under-estimated the significance of some asset types, most notably gardens. In part due to an assessment of ‘social value’ that, for gardens, was only used to capture whether a site was a ‘significant trendsetter for later works.’[16] In contrast ‘social value’ for natural sites was broader and included concepts of access and enjoyment, sense of place and belonging, ecosystem services, and existence value.[17]

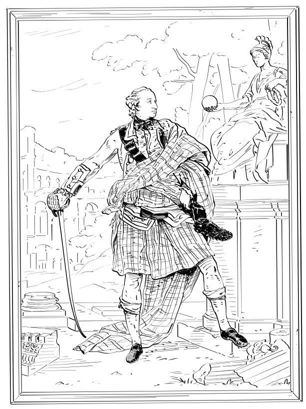
To ensure consistency when assigning significance, ‘the Heads of Conservation Service met in during an intensive conference lasting a full week.’[18] `An understandable decision, given the breadth of the work’s remit and the desire to ensure consistency across reporting; however, that approach also was liable to miss values held at the level of individual sites. A thorough understanding of community value had also been under-represented, and the ambition was to address this in later planned phases for the 2012 Review process (not completed).[19]

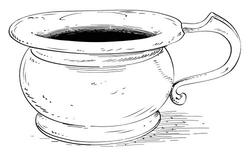
Portfolio reviews can capture a moment in time, the framework approach we have developed in 2022 is intended to allow for greater transparency of decision making; and simplified revision, as needed.

The 2022 Portfolio Review should also be situated within the context of other recent reviews.







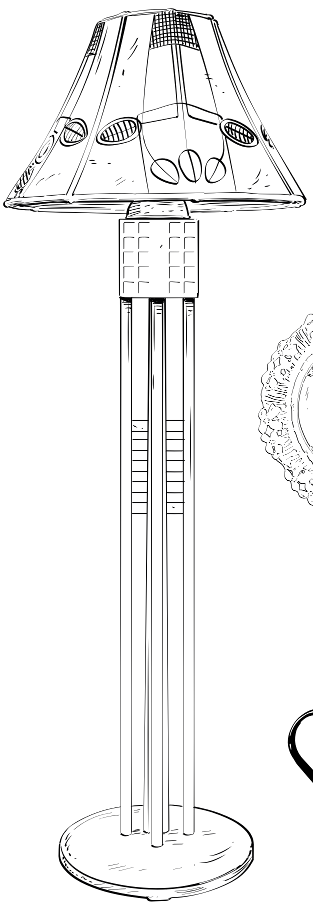


Collections and Interiors Review (2018)

This aimed to shift attitudes to collections and interiors and highlight the importance of creating a more experiential and emotive visitor experience, focused on display variety rather than quantity. Guidance formed from Collections and Interiors Review process stated that collections should consist of:

- *Items which are important in telling the story of a property*
- *Items of historical or artistic significance*
- *Items which tell the story of the Trust*[20]

The methodology for collection and prioritisation continued to be led by internal curators with collections decisions to be made for 'sound curatorial reasons'.[21] Embedded within the C&I Review there was also a desire that collections should be developed 'to use not just to have'. This marks a significant shift in the organisational culture and has proved relatively challenging to implement consistently across the Trust's varied sites.



Gardens Review (2017)

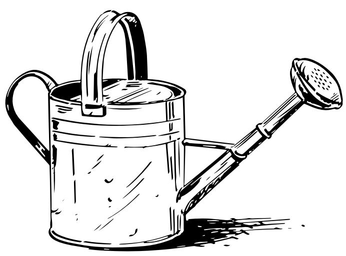
While primarily focused on resourcing, this work reiterated the Trust's key purpose to provide conservation and access to its gardens.[22] Sites were ranked according to their importance to the Trust, integrating measurements of cultural and natural significance (conservation value and plant collection value) with measurements related to use (visitor experience value, which combined an estimation of visitor numbers with an assessment of a site's potential). Scores formed from existing data from the Inventory of Gardens and Designed Landscapes,[23] the Trust's internal data related to visitor numbers, and assessment by the Head of Heritage Gardening.

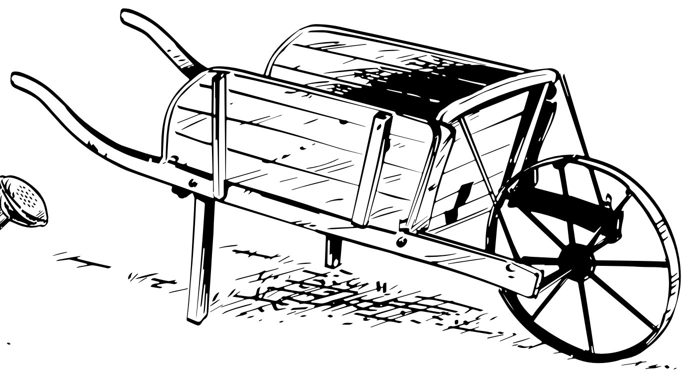
Both Collections and Garden reviews highlighted:

- *The importance of detailed knowledge for informed decision making.*
- *A move away from an assessment of primarily the cultural significance of assets, to including an assessment of the social, and less explicitly the economic, impact of an asset for the Trust*
- *The role that a curatorial figure currently plays in the organisation's assessment of the importance of these respective assets*

Developing from the experience of past reviews it is essential that the current Portfolio Review:

- *Builds from a solid knowledge base*
- *Considers how information is gathered, and by whom*
- *Uses a holistic understanding of significance*
- *Considers the variety of potential measures against 'values'*
- *Acknowledges the internal and external stakeholders*





EXISTING DATASETS & COLLECTIONS MANAGEMENT

To be able to ask questions about the current and future of the portfolio, it is essential that there is a solid knowledge base for each asset type. The value and importance of knowledge (data and professional expertise) cannot be overstated in this context; from being able to know where something is, to knowing the context it should be set in, as well as its care and conservation needs, are all key to keeping the Trust Portfolio as positive resources, contributing in individual and collective ways, to the Trust's purpose and vision.

Building upon the knowledge of staff, and drawing on external expertise when required, the Trust has invested significantly in recent years in consolidating this knowledge base. This has brought internal systems and datasets into line with national and international standards, and significantly developed the understanding of what the Trust cares for.

The Trust invests in data in many forms, from the asset-based data discussed in more detail below; to financial accounts, visitor satisfaction surveys, and broader social and economic assessments of both landscapes and visited sites. For this section of the Review, the focus is on the tangible asset datasets (books, buildings, archaeology, plants). This both provides direct comparison of the known data for different asset classes, but also demonstrates potential for further development of the Trust knowledge base, as gaps and developing datasets can be clearly shown.

Data management is complex with many strands, particularly for a large organisation with a wide-ranging portfolio of assets. To capture the relevant data and give clarity this review has formed Asset Data Tables (seen below), these map current assets, held in big datasets (some complete, some in development), and the contribution each can make to fulfilling the organisation's strategy. These show the factual information currently available across the Portfolio's assets, from age and condition, to location, and statements of significance.

An overview of data sources enables cohesion as well as highlighting gaps in both the current portfolio and knowledge base. Other Trust-wide knowledge and insight is available, linked to such areas as, financial information, visitor experience, or coastal erosion; and the Table can be expanded or adapted to reflect new information, as well as updates to the current datasets, as required.

Where current links between assets and other reports are known these have been stated.

The Asset Data Tables (provided in abridged extract within this report, and in the Appendix) are designed to be a tool for engagement and understanding between Trust teams, and across the organisation. Providing clarity on both: existing knowledge sources and, pinpointing repositories for new information. All of the datasets are discussed in significantly more depth in a staff-facing INSIGHTS: Data paper produced as part of the Portfolio Review process. The Asset Data Tables instantly highlight the scale and diversity of the estate, but also reassures as to the depth of the knowledge base. Avenues for integration of specific Trust data sets are also discussed in the INSIGHTS: Data paper.

While there is always more data that can be gathered, there is also a recognition that striving for perfection can hinder future progress. Acknowledging the extensive work that has been done, and looking to see what questions can be asked of datasets, can develop the understanding of the Portfolio as a whole. It also increases understanding of the role knowledge plays in starting wider conversations about what stories the organisation is currently telling, the stories it should tell, and to whom it could tell them in the future.

...looking to see what questions can be asked of datasets, can develop the understanding of the Portfolio as a whole.

Fully assessing all existing datasets falls outside the remit of this review project. The decision was taken to focus detailed analysis on one dataset – the Built Estate Asset Register (BE-Register) – and to utilise this as an example of what questions can be asked of the current data and to provide an indication of where attention could be focused to develop our understanding for the future. Please see the Built Estate Analysis Report for further information and insight.

ASSET TYPE	INFORMATION		RECORDS CONTAIN						
	Source	Related Standards / Links	Name/ Identifier	Location / GIS	Age	Condition	Use (where relevant)	Copyright known / held	Significance Assessment
Built Estate *(1179 built structures)*	Built Estate Asset Register	National Register of Listed Buildings/ National Buildings at Risk Register/ Canmore (photographic record)	●	◒	◒	◒	●	N/A	●
Nature Conservation *(Natural Capital)*	Assessment for individual properties	Natural Capital Research	●		NA	Assessment informs understandings of condition	●	N/A	N/A
Nature Conservation	Assorted	NatureScot Condition Monitoring Program	●	◒	N/A	◒	N/A	N/A	●
Museum Object – Collections *(c. 140,000)*	Collections Management System (CMS) - Axiell Collections Objects module	SPECTRUM Bsi PAS197:200	●	●	●	●	●	●	◒
Books *(c. 80,000)*	Collections Management System (CMS) - Axiell Collections Library Module	Various book cataloguing standards	Much of the book collections is catalogued in card indexes, spreadsheets and on Axiell Collections library module. However, the cataloguing methods used are not compliant with current cataloguing standards, there are no consistent shelf marks in place, and some library collections have not been catalogued.						
Archives *(c.75,000 items digitised with focus on the Canna House archive)*	Collections Management System (CMS) - Axiell Collections Archive Modules	ISAD(G) cataloguing standard	●	●	●	●	N/A	●	
Collections Images *(c.250,000)*	Digital Asset Management System (Portfolio DAMS)	Various digital asset metadata standards	●	●	●	N/A	N/A	●	N/A
Corporate Photographic Archive Catalogue *(c. 80,000 images)*	Digital Asset Management System (Portfolio DAMS)	Various digital asset and metadata standards	◒	◒	●	N/A	N/A	◒	N/A
Other Digital Asset Collections *(digital media focus)*	Potential to develop the Portfolio DAMS to manage								
Archaeological Sites *(c.11,000 – includes Designated sites, those within Battlefields and Gardens and Designed Landscapes and undesignated sites)*	Archaeological Resource for Properties; Internal GIS and NTS SMR	Canmore, Pastmap and CIfA	●	●	●	◒	N/A	N/A [If photos or plans are put into Canmore they are generally no longer NTS copyright]	●
Plant Collections *(c. 100,000)*	IrisBG	Demeter (previous database); Legal Requirement to report on plant disease and provenance	◒	◒	N/A	◒	N/A	N/A	

● Information is held for all assets ◒ Information is held for a proportion of assets

ASSET TYPE	COMMENTS ON			
	Conservation	Engagement	Sustainability	GAPS / Representative
Built Estate *(1179 built structures)*	Illustrates variety of type/date/use/ location/ condition which allows for prioritisation at the organisational level.	Informs analysis linked to locational accessibility of sites – additional GIS input would further support this discussion.	Specific financial information captured within Estateman database (sits parallel to Estate Classification Database).	Analysis highlights areas of under-representation (I.e. urban buildings, pre-1700 buildings). Challenging to sit within national context without development of external datasets.
Nature Conservation *(Natural Capital)*	Ability to track change embedded in process. Situate within wider sector discussions and aid advocacy.		Flows captured (i.e. carbon capture) essential to understand organisation's sustainability in the future.	Locate within national thinking & highlight benefits of natural heritage sites.
Nature Conservation	Condition monitoring for sites and species essential to support conservation.	Information captured linked to remoteness of site.		
Museum Object – Collections *(c. 140,000)*	Condition score (1-4) & links to Condition Reports: Supports prioritisation, allocation of conservation spend, the facilitation of loans and helps meet Accreditation standards.	CIIM used to link moveable collections and images with intent for public access. All oil paintings currently accessible via ARTUK; All musical instrument collections available via MINIM.	Knowing what is owned, and location, has improved staff efficiency and paved the way for Review & Rationalisation (in long-term reduces storage costs and improves the quality of the collections cared for).	Collections with the highest significance are primarily those intrinsic to properties. Any collection acquisitions and disposals are guided by the NTS Collections and Disposal policy and, where appropriate, site-specific Collections Development policy statements.
Books *(c. 80,000)*	Vision for Library Catalogue project developed between Collections Team and experts at Edinburgh University Centre for the History of the Book. Desire to run a project, similar to Project Reveal (Museum objects), within the next five years. This project would allow for the auditing of the book collection, support accurate insurance, and explore the potential of the collection for interpretation and research.			

ASSET TYPE	REVIEW, ACCESS & ACTIVITY		
	Regularity of review / review planned	Linked Activity	Accessibility of Information? (Internal/External)
Collections Images *(c.250,000)*		Project Reveal 2017-2019	Internal – currently via Netpublish accessible via TrustNet. New staff interface is in development using the CIIM to create more user-friendly access to collections data and collections images (see above).
Corporate Photographic Archive Catalogue *(c. 80,000 images)*			Internal – currently via Netpublish accessible from the front page of TrustNet.
Other Digital Asset Collections *(digital media focus)*			
Archaeological Sites *(c.11,000 – includes Designated sites, those within Battlefields and Gardens and Designed Landscapes and undesignated sites)*	New work is submitted annually to Discovery and Excavation in Scotland and then added to Canmore by HES. Condition updated as capacity.	Condition Monitoring Coastal Erosion project Interpretation projects	Internal Canmore and Pastmap are both accessible externally both by the public and by our staff and members.
Plant Collections *(c. 100,000)*	In Spring 2022, Project PLANTS (3 year project across 39 gardens) launching (based on pilot in 2021). Once project is complete regional gardening teams will take responsibility for updating records, overseen by the Curator of Plant Collections. An annual audit process will be developed.	In Development (with learning from process of Project Reveal).	Internal

This is an extract from the full Asset Data Tables which can be examined in detail, in the Appendix and in the INSIGHTS: Data paper .

A VALUES FRAMEWORK

An INSIGHT: Framework pack has been produced for the Trust as part of the Portfolio Review. This provides further background and formative information, but 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.

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.[24] In 2018, the Trust defined value as: 'the merit or regard we attach to a place, object or process'.[25]

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).[26]

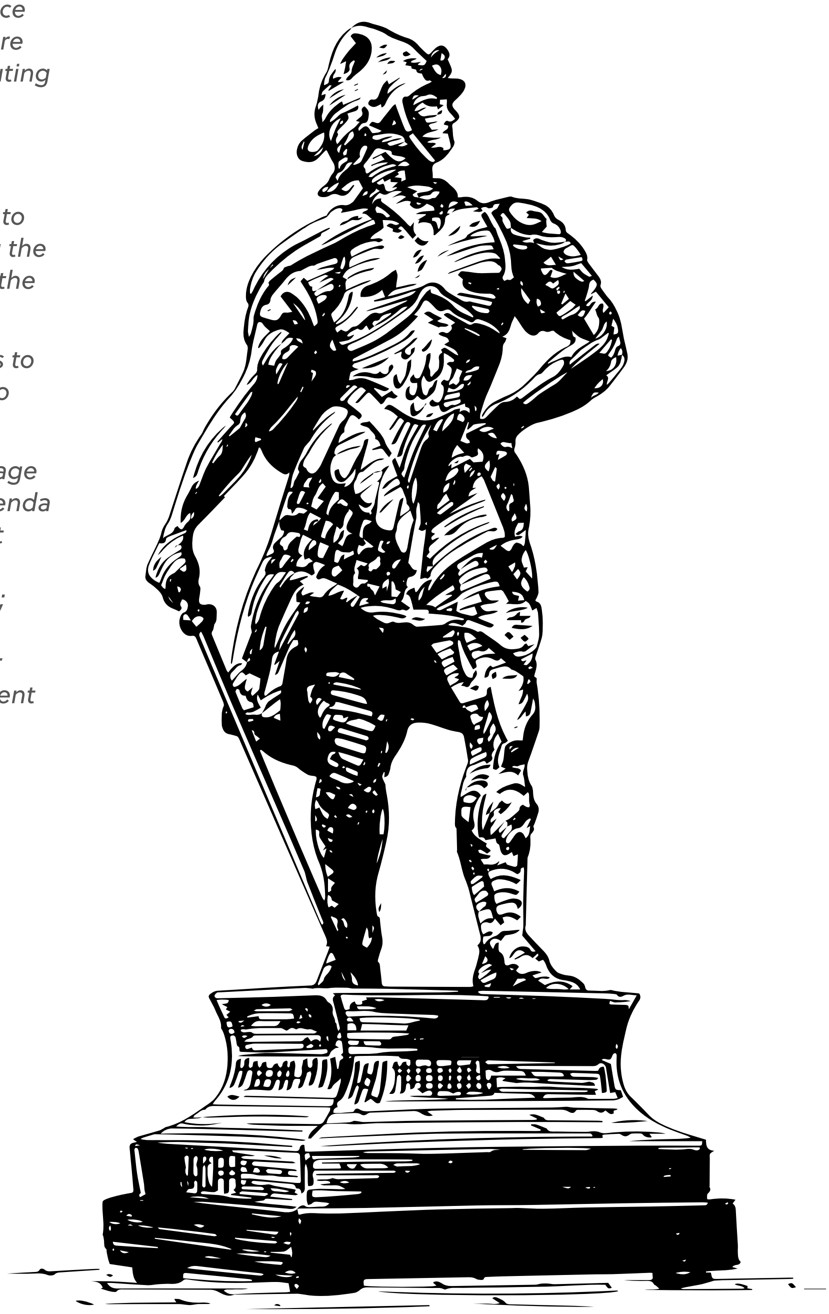
It was the significance of sites that was assessed in the 2012 Portfolio Review.[27] The individual significance of sites is captured in site-specific Statements or Summaries of Significance which exist for Visited Properties and, increasingly also for non-visited properties.[28] However, the Trust also 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.

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.

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.[29] These four pillars have been articulated, in the context of Scotland's built heritage, as:

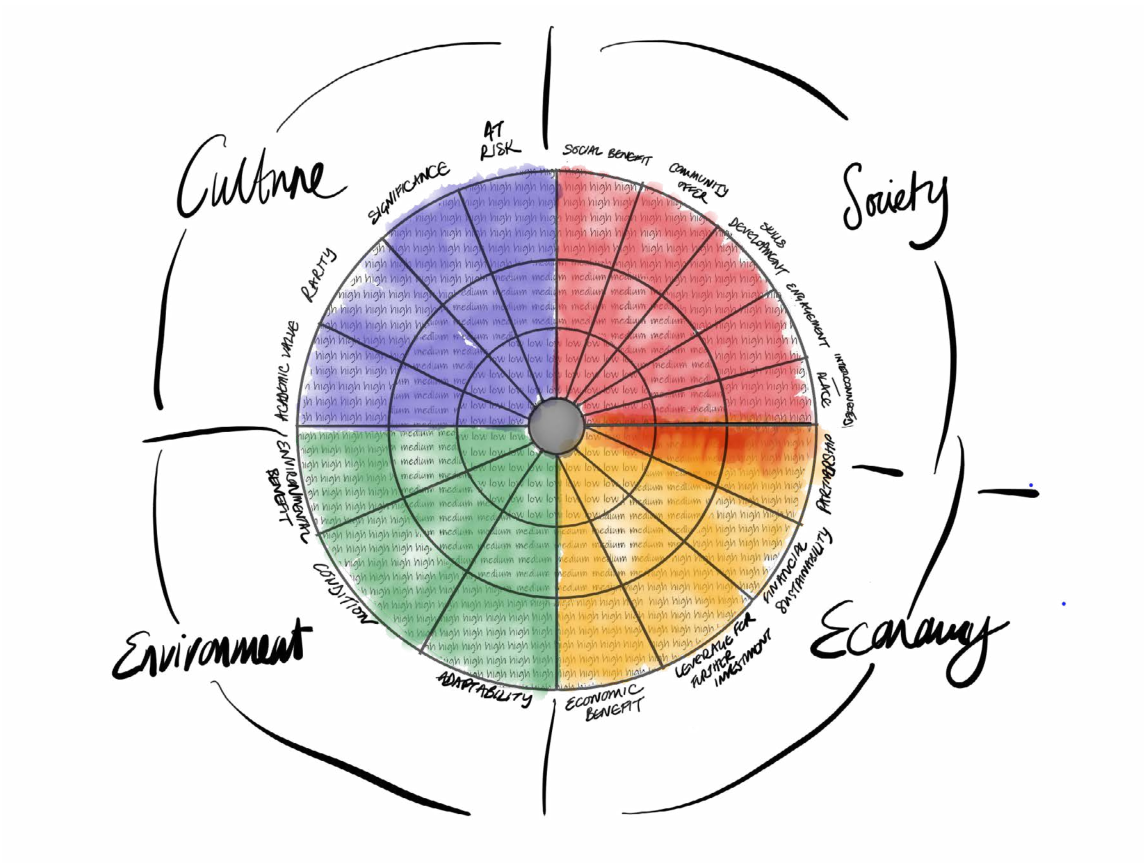
- *Economic Sustainability – ensuring individual assets are financially secure, reducing reliance on on-going public funding and grants where possible; ensuring the asset's use is contributing to local prosperity*
- *Cultural sustainability – valuing the cultural significance of place and community, 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 this*[30]



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 2022[31].

The original Sustainable Investment Tool visual:



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 (trialled 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.

Adjustments included:

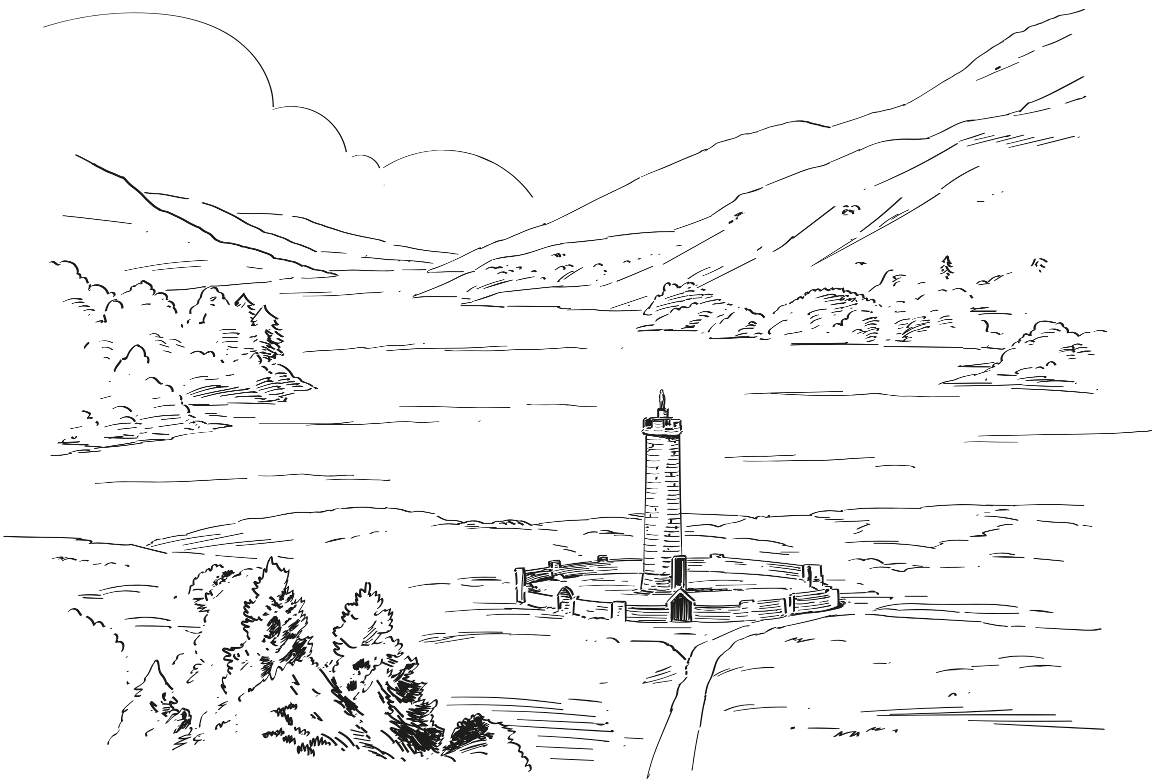
- **A** *Aligning the Framework with the Trust's statutory purpose and strategic priorities*
- **B** *Including developments in terminology since the production of the original Framework, particularly regarding net-zero*
- **C** *Reflecting the 'condition' of assets, as appropriately reflecting ownership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

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.

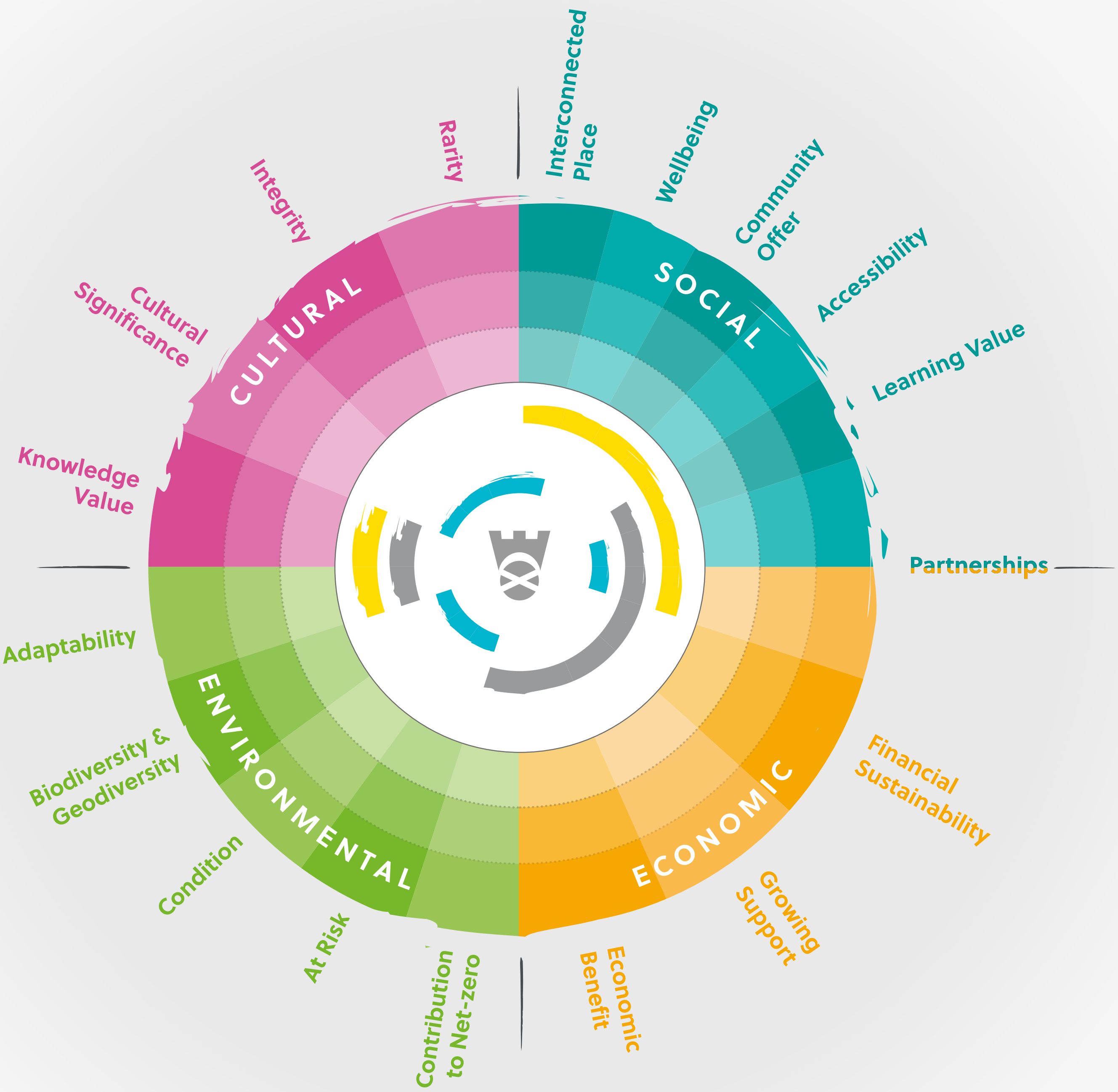
A range of 18 indicators, aligned with the organisation's Strategic Aims, have been developed.

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.

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. (An extract follows the framework.)



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		• 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	
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.

Engagement Sustainability Conservation

This is an extract from the full Data Tables supporting the Values Framework Graphic. These can be examined in detail, in the Appendix and in the INSIGHTS: Values Framework paper.

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*	
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			
Environ-mental	**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 occuring 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	

● Engagement ● Sustainability ● Conservation

This is an extract from the full Data Tables supporting the Values Framework Graphic. These can be examined in detail, in the Appendix and in the INSIGHTS: Values Framework paper.

WHAT WE LEARNT FROM PILOTING THE TRUST VALUES FRAMEWORK

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,[32] 'Culloden 300: Living with the Battlefield, which focused on understanding the emotional connection visitors have to Culloden,[33] and the site-specific economic benefit report commissioned for Fyvie.[34]*
- *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.

ACQUISITION

HOW WE ACQUIRE

How the sector decides what properties or assets to acquire, is frequently informed by acquisition policies. Taking into account their stated, and sometimes statutory, aims as an organisation; enabled by current financial and social circumstances; and often taking advantage of changes in national policy, or local circumstance.

Current sector acquisition polices need to be examined to consider what factors could inform the future portfolio. The Trust has a continued commitment to the acquisition of property. In recent years specific acquisition criteria have been developed.

The most recent Conservation Property Acquisition and Disposal Policy from 2018 stated that an acquisition must be either of:

A *Critical significance to a particular area or a key surviving or outstanding example of a particular type of heritage asset*

B *Including developments in terminology since the production of the original Framework, particularly regarding net-zero*

C *Relevance to the Trust's existing portfolio of properties*[35]

It is of note that recent changes to Designation descriptors no-longer align properties to International or National significance; the terms were changed to *Outstanding* or *Significant* examples of a particular period, style or building type.[36] Will these changes prove challenging to the Trust should the Acquisitions Policy use language which is no longer supported by Designation?

Additional considerations included that:

- *Acquired properties had to be of demonstrable benefit to both the nation and work to fulfil the Trust's statutory purpose*
- *The Trust was the most appropriate owner for the site*
- *The impact of acquisition on local communities should be taken into account*[37]

The most recent acquisition appraisals have also made economic and environmental considerations, although this is currently not specifically mentioned in the acquisition policy. The incorporation of social, economic, and environmental factors within more recent acquisition considerations highlights that understanding of a site's significance can vary over time and points towards ratifying a framework which takes the breadth of these factors into account. An understanding of significance, commonly defined within narrower cultural or natural terms, is provided within the national Designation mechanism.[38]

HOW OTHERS ACQUIRE

While the acquisition policies of national cultural and natural heritage organisations continue to acknowledge the importance of acquiring sites that celebrate this traditional cultural understanding of heritage significance, an expansion of values is taking place across the sector.

Historic Environment Scotland (HES) reviewed their Acquisitions and Release Policy in 2019. Within the policy they stated that acquisitions should:

- *Be of national or international significance*
- *Contribute to the telling of Scotland's story*
- *Enhance the attractiveness and identity of Scotland*
- *Benefit the people of Scotland*[39]

Within HES' policy the cultural significance of a site is clearly assessed alongside its potential to enhance the lives of the people of Scotland. A similar requirement can be identified in NatureScot's criteria for National Nature Reserves (NNRs) which, while a designation rather than a specific organisational acquisition policy, is considered of relevance as NatureScot own a number of NNR's.[40]

Applicants for NNR status must be of national importance for their natural heritage but must also 'be suitable for presentation or demonstration of these features in an appropriate way to the public' and 'be likely to inspire people to value and enjoy Scotland's natural environment'.[41]

Both organisations suggest an acquisition shift, from a traditional concept of national, cultural or natural significance; to a more socially-focused concept. This emphasis is also echoed in the acquisition policy of the National Trust in England who state that 'Ownership by the [National] Trust should increase benefit to the nation...It can be provided through physical, visual and intellectual access and by the acquisition of properties to promote the protection of the environment.'[42]

Given the National Trust for Scotland's statutory requirement to encourage access to, and enjoyment of sites, it would be appropriate for the Trust to consider whether a similar shift should be specifically highlighted within future acquisition policies.

Trust could consider adopting a proactive acquisition policy and disposal strategy. Based on sound data, meeting future vision, and supporting charitable aims and community benefits.

DISPOSAL

The *Conservation Property Acquisition and Disposal policy* 2018 also provides an understandably brief overview of the possibility of property disposal noting that 'the Trust will only dispose of a property where ownership no longer best serves the long-term purposes of conservation, access, enjoyment and learning'.[43] The Trust does have a history of disposing or selling land and properties within its portfolio, although this is often conditional on the establishment of a Conservation Agreement. While there are a number of reasons why the Trust might look to remove assets from the portfolio that are not considered to fulfil the Trust's purpose, this is not a decision that is taken lightly.

FUTURE CONSIDERATIONS

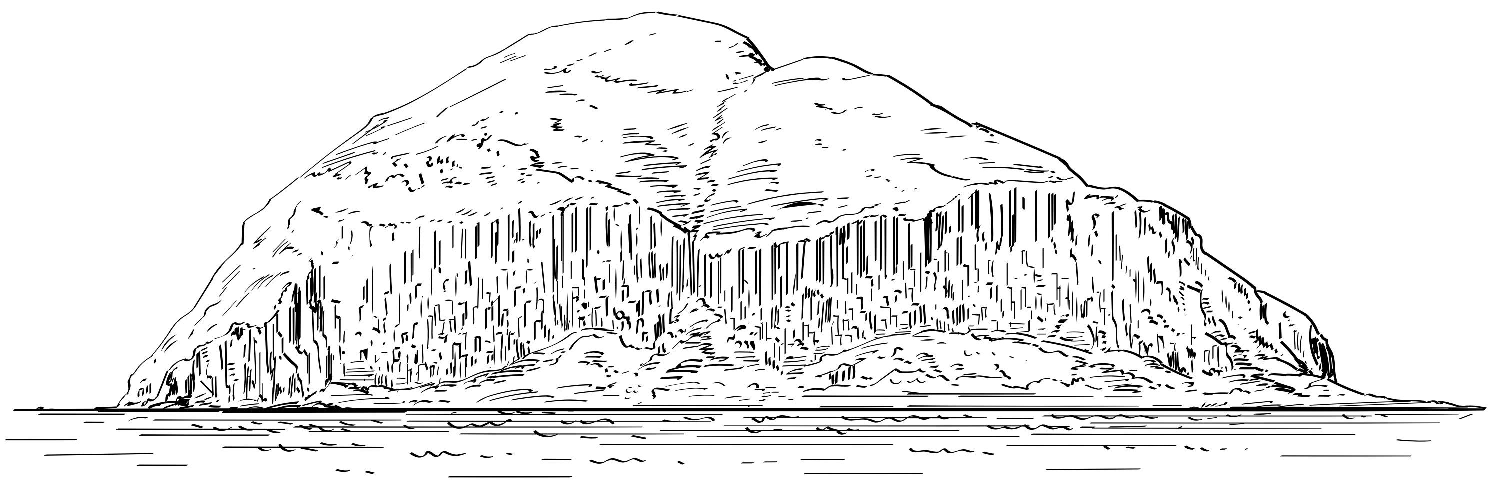
FUTURE MANAGEMENT OPTIONS FOR THE PORTFOLIO

Future Management options, some of which the Trust already pursues at the local level, should be explored. These range from adaptation of sites (partial or complete); working with communities in a variety of ways; partnership approaches; and more challenging management approaches such as Managed Decay and Adaptive Release. Some aspects retain a high degree of 'control' for the Trust, others demand close working and 'trust' being put into community hands. How these each enhance or detract from the core values of Conservation, Engagement and Sustainability are indicatively shown in a table at the end of this section.

Option for temporary ownership – learn, develop, protect – pass on – community options. A less paternalistic approach to our places, demonstrating a stronger enabling role.

An overview of the range of options and the scale of impact can be seen in the following table.

	Asset specific impact	Site specific impact	Organisation-wide impact
Site-specific adaptability	●	●	
Community Partnerships	●	●	[Impact Organisational focus]
Community Leases	●	●	[Impact Organisational focus]
Partnerships with other heritage organisations	●	●	●
Affiliate Schemes		●	●
Move Outside Portfolio	●	●	[Organisational Impact]
Managed Decay / Adaptive Release	●	●	●



1. Site-specific Adaption

The Trust regularly considers how sites can be adapted to suit developing need. This can be at a range of scales including:

1.1 Re-interpretation

An individual asset or site can use existing or developing research to provide perspectives or stories that have not previously been shared with the public. This can help to contribute to broader social discussions, drive repeat visits to a site and engage non-traditional audiences.

Research potential: Social impact of engagement of Trust as an organisation for enhanced wellbeing.

As an example, the recently published Facing our Past Report (2021), highlights connections between the properties now in the care of the Trust and known links to the transatlantic slave trade. The report offers scope for further research but also demonstrates the potential to re-interpret sites based on this new knowledge.[44]

While many re-interpretations are also positively received by existing visitor groups, there can also be more negative feedback created by the change in experience.

1.2 Adaption of space within an Asset

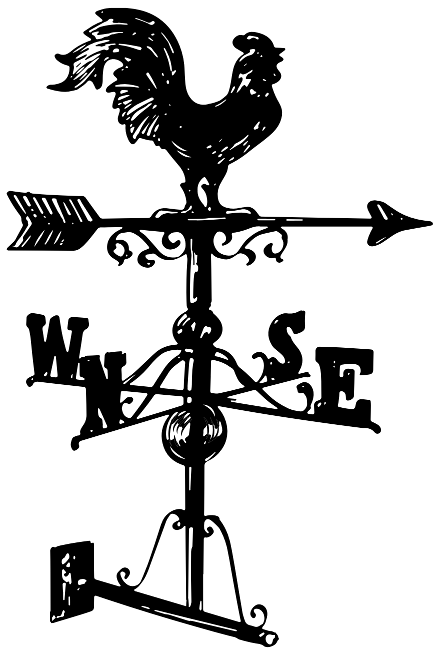
Space within an asset is usually adapted in response to practical needs. This can be to enhance the visitor offer or support the financial sustainability of the site; but can also be consistent with the Trust's statutory purpose, opening up additional access to spaces for the public or reacting to the conservation needs of an asset.

Adaptions can also be aimed at particular audiences, as with 'Weehailes', at Newhailes (2018). Making an underdeveloped Kitchen Garden into a play area, the adaption has provided an additional destination, growing the offer for families. An increase in visitor numbers to the site is reported with the additional charge for use of the area, positively impacting finances and, anecdotally, membership sign-ups.

Perceptions of change of use are commonly derived from the individual needs and priorities of the visitor or user. Clear communication with visitors, staff, and volunteers, is important, particularly if an adaption could be perceived to challenge an aspect of the Trust's statutory purpose.

1.3 Adaption of whole Asset

For some, although not all assets, there is also the potential to adapt the whole asset to serve a different use for the Trust, or as a result of the exploring of alternative management options. Reaction to this is likely to be shaped by perception of need and communication.



2. Community Partnerships

Community ownership and, more recently, community wealth building are core components of government policies within Scotland. Many Trust sites already engage with the communities. Renewed focus comes from the Land Reform Act (Scotland) 2016 and the creation of the Scottish Land Commission in 2017.[45] Community partnerships can occur across a range of scales and often serve different purposes:

2.1 Activity & Group Specific Engagement

This can encourage access to the site and can be particularly effective to engage with local community members who might be disengaged. Some activities can also involve a payment, and while this limits access it can help with financial sustainability. Activities can also be utilised to indirectly promote the statutory purpose of the Trust.

Sites across the Trust run events, often seasonal and aimed at families. There is the potential to expand understandings of what communities want from sites, through activities like the Social Value Toolkit. This is likely to further partnerships, positive relationships, and depending on the partnership, the financial returns from an activity.

2.2 Use Partnerships

The use of assets can also be shared between an organisation and a local community group/s, to fulfil the needs of all parties. Partnerships of this type can vary significantly, ranging from a shared space for the display of information, storage, or providing a space for common services. The Trust is involved with Use partnerships of varying degrees, including the Canna Partnership, a formal agreement, which brings the Trust together with the Canna community to develop the island's future.[46]

There needs to be clear understanding of what both parties hope to gain, and who is responsible for required resources. Formalising partnerships, while taking time and resources for consultation and discussion, can help to reduce the challenge of shifting personnel, both within the Trust and within the local community.

2.3 Co-ordinated local management/ vision plan with community stakeholders

While clearly demarking Trust site boundaries is vital for the organisation, for both visitors and nature these boundaries often have little relevance. It is also important to recognise that perceptions of a Trust asset will be impacted by the landscape that surrounds it, irrespective of whether the landscape is owned by the Trust or not. Discussions of an asset's benefit to the wider economy also highlights that visitor spend is often not restricted only to Trust sites within a local area.

The Trust already aims to work with local stakeholders and communities although this is often an informal relationship built upon existing relationships.[47]

Potential for formalised, with examples, guided approach for community and Trust vision and partnership plans.

A more formalised management/vision plan could enhance benefits and co-ordinate approaches to local tourism, procurement, and environmental concerns. While recognising that any template would require significant flexibility, a consistent approach from the Trust would be likely to open up additional options and provide site-based staff with confidence to pursue or formalise arrangements. This has been particularly effective for management of landscapes, 'The Nevis Landscape Partnership is a community organisation working in partnership to enhance the environmental and cultural qualities of the Nevis area whilst providing opportunities for all to enjoy and appreciate it.' Here a shared vision and strategy supports all parties.[48]

3. Audience-specific Leases

The Trust already lets part of the Portfolio. However, two specific types of leases should be noted in greater detail.

3.1 Community Leases

In recent years there has been increasing interest in leasing assets to communities on long-term, often repairing, leases. These leased sites are maintained by a community body and look to enhance access to the site.

The Trust has explored this option for specific sites within their care, such as Kippen Smiddy. Community leases often ensure access to a site is maintained and can ensure expertise and community knowledge is utilised. Assets are also, by definition, closely tied to the community who hold the lease and can draw on their additional personal links to other local community groups. The Trust can also continue to provide expertise and support if required and Community groups can often access funding that is not available to the Trust.

However, this approach is not without its challenges. It is a significant commitment for a community to maintain and run an asset, guaranteeing its conservation and public access. Community projects often rely heavily on external funding grants or the financial input of philanthropic individuals. There can also be a reluctance for conservation organisations to explore the option of community leases if finances are not considered to be secure, an issue which can be compounded by differing perceptions of the finances required. Whilst more advice is available for communities, including from DTAS - Community Ownership Support Service[49], robust governance for community organisations remains necessary before meaningful engagement can take place.

3.2 Repairing Leases to Private Individuals

In this the Trust does not bear the cost of upkeep of the site but access to the site is likely to be reduced. The lease would also be reliant on an individual having capital or skills to bring to the property as external lending could not be raised on the Private Residential Tenancy which would have to be offered.

This option has been explored by the Trust on more than one occasion recently but has not been brought to a successful conclusion due, in the main, to restrictions in residential leasing law.

4. Partnerships with other heritage organisations

Other heritage organisations are likely to have similar values to the Trust, although differences in emphasis and priorities will occur. Partnerships can be divided primarily into two groupings:

4.1 Partnerships of Proximity

Working with other conservation organisations with investment in the area around a Trust held asset is likely to benefit both parties. These partnerships can operate across a broad scale, from the sharing of an asset, to a developed formalised partnership to maintain an asset together, possibly on behalf of a third party.

While partnerships would not necessarily drive additional visitor numbers, they allow for the sharing of resources and cost, spreading risk and expense. Admittedly, close partnerships may also have the potential for a lack of clarity between the two (or more) distinct charities which may serve to confuse stakeholders.

4.2 Partnerships of Interest

Partnerships with other heritage organisations could help to create a community of interest and support and may act to drive visitor interest into a particular topic, while allowing for complimentary, rather than overlapping, interpretation.

It is, however, recognised that funding across sites is often competitive and that having two sites with similar interests traditionally encourages competition for available funding rather than collaboration. While partnerships between sites of this type are possible, and maybe mutually beneficial, it is likely that developing this would require a significant re-appraisal and re-understanding of partnerships of this type.

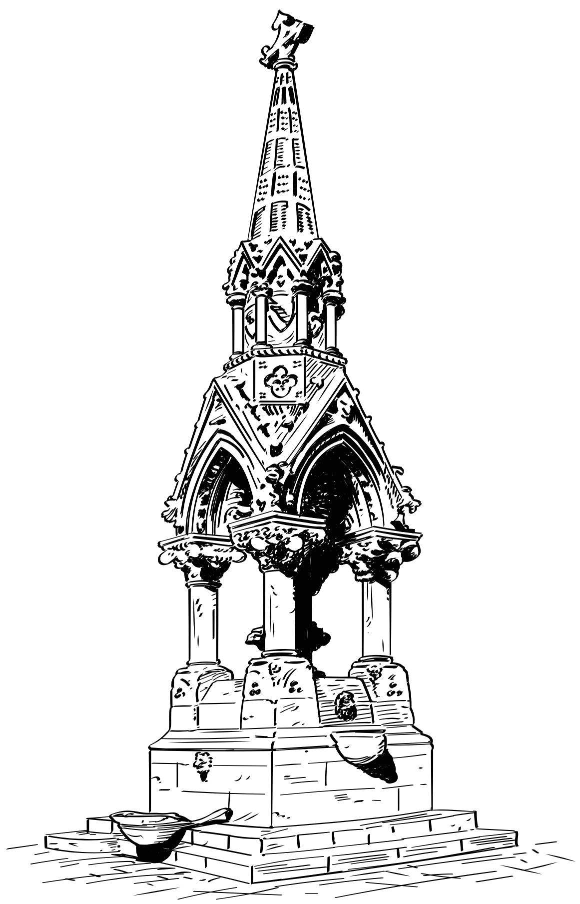
5. Affiliate Schemes

Here, promotion (often through digital communication) is made by a third party who receiving a commission if traffic, or a purchase, is generated directly via their promotion.

This is a relatively low-cost approach to growing support, with the targeting of audiences and messaging possible. Depending on the agreement with the third party, the Trust can also maintain a significant degree of control reducing the potential for dilution of the National Trust for Scotland brand. It would remain important to consider if the third party are aligned with the organisation's values. This reduces reputational risk and supports clarity about the organisation's purpose.

The Trust could also act to raise the profile of other brands by acting as the third party and receiving a commission for traffic generated through the Trust's site.

The LHIS was very clear about the temporary nature of acquisitions.



6. Move outside Portfolio

The Trust has released property from its portfolio in the past, often with Conservation Agreements in place.

The legal restrictions on disposal at some existing Trust sites limits the scope of disposals. The perception that Trust sites are held for the long-term, means disposals can be controversial. This is particularly the case if disposing of an asset is perceived to have negative local impacts, or is viewed as in contradiction to the values of the organisation. The most developed example of the Trust disposing of assets was done deliberately, as part of the Little Houses Improvement Scheme (LHIS). Established in 1960, the LHIS involved the Trust, often in partnership, purchased, restored, and then sold, usually small, architecturally significant houses often in urban environments. The LHIS was very clear about the temporary nature of acquisitions and, while sites did not align specifically with the Trust's priorities for the portfolio, it was recognised that they were significant enough at the local level to merit specialist conservation attention.[50]

Reflections on both the LHIS and other examples of assets moving outside the portfolio highlight the importance of transparency and clarity of communication.

The Community Empowerment Act (Scotland) 2015[51] has moved community ownership from aspiration to possibility. This has seen public sector assets, including heritage assets, transferred to local community ownership. Well maintained Trust sites (of all asset types) could find themselves beneficial to communities in numerous ways: whether as tourism sites, necessary amenity facilities, or local homes. Perhaps bringing new consideration to the concept of the Trust as the *most appropriate owner for the site*.[52]

Raising the profile of Conservation Agreements is also likely to support discussions around properties moving outside the portfolio, and perhaps into community hands.

7. Managed Decay & Adaptive Release

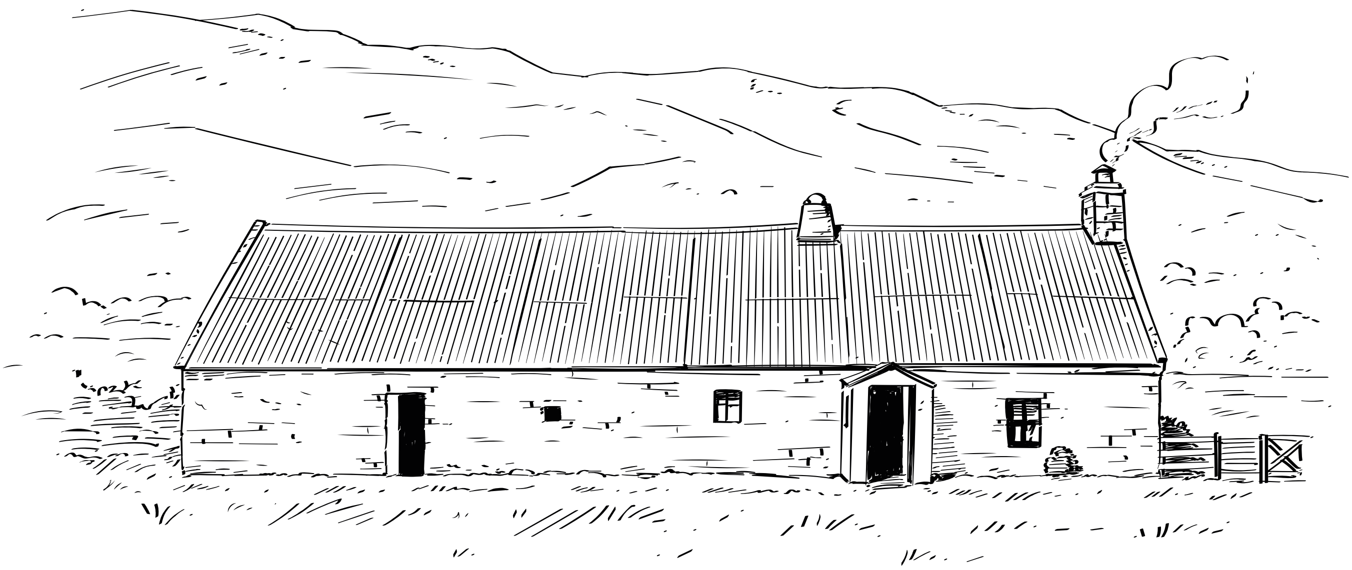
There has been some initial discussion within the sector about the concept of managed decay. This would see sites in statis, or deterioration, rather than receiving significant and continued conservation investment, being managed into a state of decayed stability.[53]

While this approach recognises the financial challenge of maintaining (in this context specifically historic) sites, and acknowledges the wider environmental factors of increased deterioration, it is also acknowledged that this position would represent a significant shift in thinking, and policy, within the sector, as well as a re-evaluation of the role of conservation charities.[54]

Management: Insight & Future Considerations overview

Operational *Enhancing a Sustainable Trust*	**Portfolio** *Conservation for the future*	**Advocacy** *Encouraging Engagement*
Suggest Sector roundtable to discuss approach with other asset holders (HES, CoS, HH, SFT).	Option for temporary ownership – learn, develop, protect – pass on – community options. Less paternalistic approach to our places, a stronger enabling role.	Research: Social impact of engagement of Trust as an organisation for wellbeing enhancement.
Potential for formalised, with examples, guided approach for community and trust vision and partnership plans.	Conservation Agreements/ Burdens: only effective if enforced. Consider the effectiveness more widely – specificity can improve effectiveness.	Could use data from review to understand what matters to communities of place and interest. (Visitation records, wellbeing reports.) Engage with Local Place Plans process.
Monitoring: monitor leases and property condition to ensure compliance with the organisation's charitable purpose.	Conservation agreements: Recommendation – cannot expand current 'offer' and explore this avenue without knowing where Trust could be open to reputational risk.	

The below table gives an indicative overview of the potential to increase (and decrease) indicators across the Values Framework by implementing certain management types (as discussed above). 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	Interconnected Place	At Risk	Condition	Biodiversity & Geodiversity	Knowledge Value	Wellbeing	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 • *Site Previously Trust owned*		○	○	○				●	○	○	○	○	○	●	●	●	○	
Conservation Agreement • *Site Never Trust Owned*					○		●	●					○	●		●		●
Site-specific Adaption • *Re-interpretation*								●	●	●	●	●	●	●	●	●		
• *Adaption of space within an Asset*		○				●	●	●	●	●	●		●		●			
• *Adaption of whole asset*		○				●	●	●	●	●	●	●	●		●	●		●
Community Partnerships • *Activity and Group Specific Engagement*						●			●	●	●	●			●	●		
• *Use Partnerships*								●	●	●	●		○	●		●	●	
• *Local Management/ Vision Plan*				●			●			●	●			●		●	●	
Audience Specific Leases • *Community Leases*										●				●		●		
• *Repairing Lease to Private Individuals*[2]				○	●	●				○	○	○	○	○	●	○	○	
Partnerships with other heritage organisations • *Partnerships for proximity*				●			●			●	●		○	●		●		●
• *Partnership for Interest*								●		●	●	●		●	●	●		
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.

TRUST IN CONTEXT: WHAT OTHERS COLLECT

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

● Present ◒ Present but Limited

COLLECTING & ACQUISITION: THE FUTURE PORTFOLIO

The previous page highlights the Trust within the context of many other organisations which collect/manage/own natural and cultural heritage sites within Scotland. The diversity of the Trust's estate is instantly apparent. With that diversity comes potential, a lot of skills and tools, a lot of expertise; but also a lot to: manage (in various forms as discussed), conserve, maintain, and ensure sustainability for the future.

Perception of the Trust may be narrower than the vast array of sites and management approaches than are taken to pursue sustainable charitable, conservation and access aims. More emphasis on what these approaches bring to the Trust could help to highlight how budget diversification and benefit can be found through the array of activity that is not solely focused on the visited properties.

Consider forming a purpose of the portfolio statement.

As we've noted, the Trust is committed to making future acquisitions, based on a detailed understanding of a site's significance. Recent discussions, particularly from the Museum sector, also highlights two additional questions that should be asked when considering acquisitions:

Who decides what might be collected?

Museums and heritage organisations collect for a wide public, often specifically for a nation. However, the decision about what should be collected is often in the hands of a single individual or small group, often with very similar concepts of value.

In Museums, this recognition has led to an increased desire for transparency within collecting policy and, although often in a more limited capacity, community collaboration when collecting.

Consider revisions of organisation's definition of Significance.

Within heritage there is renewed call for conversations with communities about what matters to them[55]. How we define, discuss, and choose what to conserve for the people of Scotland is in flux. How this develops over coming years is influenced and led by national organisations.

As Scotland begins to form the next national strategy for the historic environment (due 2023) there is strong role for the Trust to play, based on its broad examination of values, and what can be delivered by its developing portfolio.

What is collected?

Particularly, although not exclusively in Museums, it has been highlighted that collecting indiscriminately does not necessarily serve either the Museum institution or the wider public particularly with little possibility of public access.[56] This has led to an increased focus for organisations on developing collection policies which can focus on collecting around specific, identified themes and prevent overlap with the collections of similar organisations.[57]

For the Trust it is therefore important to think about what other nature and culture organisations with national collections collect and to place the Trust's existing portfolio within this context. (See table above). When faced with this representation what should be the Trust's aspiration? Is it a comprehensive collection of all asset types at national level, or is it about working with partners (and implementing a wide spectrum of management options) to ensure protection for all asset types?

The Table serves to highlight the unique breadth of the Trust's portfolio, operating, in significant scale, across sites with both natural and cultural significance. The Trust recognise the holistic inter-relation across the landscape of these sites. In turn, the scope of the Portfolio points to the multiple partnerships that the Trust can engage with, facilitate, and support, already connected to their existing Portfolio.

The Table is intended to provide an overview of heritage sites that operate across Scotland. It should be recognised that gaps in the table, particularly related to industrial heritage can be filled by organisations who operate either at the single-asset or local level.[58]

Perhaps for the Trust a third question should be set, related to: how do we manage what is collected?

Each of the Management Options already described can be applied to different aspects of the existing Portfolio. However, they could also apply to future acquisitions, and significantly enhance the Trust's engagement with communities across Scotland.

PRIORITISATION – IN AN ERA OF CULTURAL, SOCIAL, CLIMATE AND ECONOMIC CHANGE

Rather than simply deciding what should be 'collected' or even who decides, a values-based approach enables a broader, and more sustainable decision-making process. One which reflects wider society interests, community needs, and enables greater benefits.

Although the sector is beginning to embrace this approach, the Trust are further along this road than many organisations. As tourism has proved less stable in recent years due to global circumstances, talk of how prioritisation can occur has begun to come to the fore. From national newspaper articles on managed decay, to asset management approaches, and the recent Green Recovery Statement for the sector[59], the tide is turning.

Scotland's Culture Minister, Neil Gray is quoted as stating (in relation to the formation of a new National Strategy for the Historic Environment):

'I'm pleased to see Historic Environment Scotland reviewing and reframing its priorities to address our challenging times by including greater emphasis on communities, tackling inequalities and responding to the climate emergency.'

Heritage - in all its forms, is seen as far more integral to society than the traditional assessment of the cultural importance of the stones that may have formed it, or the views we wish to protect for the future.

Other national heritage organisations are currently in the early stages of adopting a similar values-based approach, taking inspiration from the Sustainable Investment Toolkit (which was the initial impetus for the NTS Framework) when considering their own estate (Properties in Care). Scotland's Future's Trust are now considering inclusion of the Sustainable Investment Toolkit as referenced within their Asset Management Strategy.

DCMS released guidance on considering cultural heritage capital[60] to help informed decision making. Historic England, and Historic Environment Scotland have released documents around understanding carbon in the historic environment (HE).[61]

Further evidence of changes in thinking can be seen in work by the Scottish Land Commission, using a values framework for capturing wider benefits in relation to Vacant & Derelict Land[62]. Historic England have a new grants scheme for Everyday Heritage, encouraging a more community focused approach to the heritage people feel is important to them.[63] Whilst the work of the Church of Scotland has a somewhat different value at its heart (mission) their Radical Action Plan[64] still involves assessing what they have, to enable choices to be made in communities across Scotland.

The Scottish Planning system itself is moving from a previously plan-led, but perhaps cost-based system, to a plan-led and values-based system for the future. In that change has been identified (as the Trust has) the need to be sure of the data, and understand wider views, to support future action.

All approaches need that strong data foundation, the specialist knowledge, and meaningful engagement to underpin the step-change that is taking place in how we think about and assess our places. Strong data sources remain a challenge, but a lack of data not only fails to support robust decision making, but fails to enable future modelling for the skills and materials we need to conserve, care for, and adapt our places for the future. Advocating for better data for all our places, age, location, condition, and materials helps to form a more sustainable future for all our places. The work done by the Trust here, in deepening the knowledge it has about its buildings helps to provide a case for wider data to be made available across the country.

Use Trust learnings to develop wider advocacy ask for better building information in relation to all of Scotland's buildings.

As the Trust is developing ahead of the curve, it is well-placed to see opportunities where others are seeing disposals. Taking a proactive stance, seeking a holistic series of impacts; all based on understanding of gaps and where high impact interventions can be made.

Working across the nation, but ensuring local relevance puts the Trust in the role of enabling local choices and developing places of local benefit and importance.

These new ways of thinking support and enhance new outcomes. Whether industrial decay is being turned into new recreational experience[65], or a rural cottage is providing a much-needed home – the Trust has a part to play in the future.

What follows are some specific policy and collection reflections for the future.

Whatever the Trust collects: ensuring nature, beauty and heritage are available for everyone will be at the core. From now on, whatever the Trust acquires, can be assessed across a range of values, transparently set out, and aligned to the Trust values, now – and in the future.

Policy & Collecting: Insight & Future Considerations overview

Operational *Enhancing a Sustainable Trust*	**Portfolio** *Conservation for the future*	**Advocacy** *Encouraging Engagement*
Framework can be used to assess the now, and assess the potential, for sites under discussion in relation to other project/s work. Two stage process possible and encouraged.	Consider rapid assessment of portfolio using values framework, based on case study approach and insight. Impetus from Community Ownership Act – initial use where assets are being sought by communities.	Support – continued Member and public polling - to inform and update acquisitions policy thinking. This may mean that acquisitions change over time, this is to be embraced and expected. Aim to: enhance Membership distribution and the telling of all of the stories of Scotland.
Consider revisions of organisation's definition of Significance: Revise requirements of the contents, and balance of information within site-specific Statements of Significance to ensure that wider social, economic and environmental benefits of a property are given the same opportunity for inclusion as cultural importance. In time, ensure Statements of Significance are in place for all non-visited properties Consider the role of the 'expert' within the development of significance	Landscape within Trust context should be considered an asset class, but current data opaque and incomplete. Landscape is too important to the Trust not be more clearly defined and assessed across all Framework values (as other assets are). Currently could be considered an asset in its own right, but is also the accumulation of lots of other things defined as assets (built estate, archaeological sites, gardens etc)	Consider forming a purpose of the portfolio statement. Supports charitable purpose, but is expressed at human scale.
Make access/ people-focus explicit within significance statement.	Site-Specific adaptation could be considered through the framework, based on projections (before/after assessments – holistic consideration). Potential to see hidden benefits or unintended consequences.	Ensure Trust understanding of local recognition and importance is expressed within portfolio.
Trust could consider adopting a Proactive acquisition policy and disposal strategy. Based on sound data, meeting future vision, and supporting charitable aims and community benefits. What disposal can enable: • community ownership • greater engagement at other sites • greater fulfilment of statutory purpose • release from carbon inefficiencies	Develop and utilise Framework across all Trust asset types to inform future acquisition for all assets. Within structure of a revised OPiT, the Trust is well placed to significantly contribute to discussion on national collections / prioritisation Connecting the cultural bodies celebrating Scotland stories using the Portfolio Review as a meaningful case study process.	Use Trust learnings to develop wider advocacy ask for better building information in relation to all of Scotland's buildings. Knowing: age, location, materials and condition enable better decisions around maintenance, retrofit, and future sustainability.

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.

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

REFERENCES

1 National Trust for Scotland Order Confirmation Act (1935) - available via: **https://www.nts.org.uk/our-people/trustees-and-governance/our-constitution** (Accessed 29/10/21).

2 National Trust for Scotland Order Confirmation Act (1938) - available via: **https://www.nts.org.uk/our-people/trustees-and-governance/our-constitution** (Accessed 29/10/21).

3 D. Bremner, For the Benefit of the Nation (Edinburgh, 2001): 26-7, 255; D. Watters & M. Glendinning, 'Little Houses: The National Trust for Scotland's Improvement Scheme for Small Historic Houses' (2006): 9; National Trust for Scotland Internal property acquisition Chronology [no pg. Numbers]; National Trust for Scotland, '90 years of the Trust in 3 minutes'(2021) - Accessed via: **https://www.nts.org.uk/stories/90-years-of-the-trust-in-3-minutes** (Accessed 29/10/21).

4 This power is set out within the organisation's founding Parliamentary Act of 1935. National Trust for Scotland Order Confirmation Act (1935) states that '...the council may by resolution determine that such lands or buildings or such portions thereof as maybe specified in such resolution are proper to be held for the benefit of the nation and such lands or buildings shall thereupon be so held by the National Trust for Scotland and shall be inalienable' (p.16) - available via: **https://www.nts.org.uk/our-people/trustees-and-governance/our-constitution** (Accessed 29/10/21). In 1947, legislation was revised to allow inalienable land to be sold under certain circumstances but even after this revision, the Trust does not have the power to dispose of the principal house of the estate, commonly referred to as the mansion house, nor land connected to the site over a certain hectarage.(National Trust for Scotland Order Confirmation Act (1947) - available via: **https://www.nts.org.uk/our-people/trustees-and-governance/our-constitution** (Accessed 21/01/22): 3). Neither can the Trust use inalienable land as security for loans, although inalienable land can be leased to others. In particular circumstances, Scottish Ministers can allow a sale of inalienable land that falls outside the above limitations to proceed, and although relatively uncommon, this has taken place on occasion since 1947. An internal note on Inalienability, drafted in 2000, recognised that this legislation does not specifically define inalienability within the Trust context and while the term is commonly understood to ensure that land declared inalienable cannot be transferred outside the Portfolio, there is accommodation for this under the 1947 legislation discussed in the main body of the text (J. Mayhew, 'Inalienability' (2000): 3). It should be noted that the National Trust has a similar ability to declare inalienability on their land.

5 There is also often a recognition that sites under Private Management Agreements are owned by the Trust. Local communities or interested parties can therefore look to hold the Trust accountable for actions related to the site, even if the decisions were taken by the managing organisation. This further encourages the Trust to maintain engagement with the site.

6 The Gazeteer for LHIS includes a note that a Conservation Agreement was in place for 111 of the Little Houses sites.

7 Some of this interest has been external to the Trust. There has been increased discussion around Conservation Agreements in recent years, at least in part because of the emphasis placed on the Scottish system during consultations in England and Wales which looked to establish similar conservation covenants (The Law Commission, 'Conservation Covenants' (2014) - **https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/322592/41070_HC_322_PRINT_READY.pdf** (Accessed 11/01/2022). However, since the establishment of Conservation Burdens in Scotland in 2003, which allows all Local Council authorities as well as a number of natural and building conservation bodies to act as Responsible Bodies to establish a Burden, it has been suggested that there has been limited wider uptake of the process and there is significant room for expansion of the mechanism ((Legislation.gov.uk, 'Conservation Bodies prescribed under Section 38(4) of the Title Conditions (Scotland) Act 2003, **https://www.legislation.gov.uk/ssi/2003/453/schedule/made**).; L. Johnston, 'Conservation burdens, carbon capture and biodiversity loss' Turcan Connell (2021)- **https://www.turcanconnell.com/media/blog/2021/09/conservation-burdens-carbon-capture-and-biodiversity-loss/** ; C. Reid, 'Conservation Burdens and Covenants' Scottish Planning and Environmental Law (2014): 12.

8 A. Barrow, 'Conservation Agreements and their Potential' NTS Internal Discussion Paper

9 The Law Commission, 'Conservation Covenants' (2014) - **https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/322592/41070_HC_322_PRINT_READY.pdf: 24.**

10 C. Reid, 'Conservation Burdens and Covenants' Scottish Planning and Environmental Law (2014): 12; Also highlighted in Leith Hall Tribunal Judgement: Lands Tribunal for Scotland, 'Opinion of the Lands Tribunal for Scotland: David Grant and another v National Trust for Scotland' (2014)

11 This is also highlighted in L. Johnston, 'Conservation burdens, carbon capture and biodiversity loss' Turcan Connell (2021).

12 L. Johnston, 'Conservation burdens, carbon capture and biodiversity loss' Turcan Connell (2021) **https://www.turcanconnell.com/media/blog/2021/09/conservation-burdens-carbon-capture-and-biodiversity-loss/**

13 National Trust for Scotland, 'Property Portfolio Review, Phase 1 Report: Assessing the Heritage Significance' (2012): 1. The Review (2012) focused only on visited properties, of which 96 sites were identified. There was some engagement with the social benefits a site provided for the Trust but no assessment of economic importance as it was planned that a cost profile would follow as Phase 2 of the Portfolio Review, although it is unclear if any work was progressed in this area.

14 National Trust for Scotland, 'Property Portfolio Review, Phase 1 Report: Assessing the Heritage Significance' (2012): 3.

15 National Trust for Scotland, 'Property Portfolio Review, Phase 1 Report: Assessing the Heritage Significance' (2012): 15.

16 National Trust for Scotland, 'Property Portfolio Review, Phase 1 Report: Assessing the Heritage Significance' (2012): 18.

17 National Trust for Scotland, 'Property Portfolio Review, Phase 1 Report: Assessing the Heritage Significance' (2012): 18. Specifically Social Value for Natural sites included 'Access and enjoyment to natural features and landscapes (to include number of visitors and degree of enjoyment), Condition or 'state of being', Sense of place; setting within wider landscape, crofting. Life-support value; ecosystem services; regulating services (e.g. flood management); climate change mitigation, especially carbon sequestration and storage. Cultural attachment and sense of belonging, landscape defining social activity or order (past, present, future). Existence value – value places on natural features by people who do not necessarily visit – remote application; iconic species or landscapes.'

18 National Trust for Scotland, 'Property Portfolio Review, Phase 1 Report: Assessing the Heritage Significance' (2012): 7.

19 National Trust for Scotland, 'Property Portfolio Review, Phase 1 Report: Assessing the Heritage Significance' (2012): 4.

20 National Trust for Scotland, 'Developing Collections: A Policy to Reflect and Enrich Lives' (2019): 6.

21 National Trust for Scotland, 'Developing Collections: A Policy to Reflect and Enrich Lives' (2019): 2; Some additional information regarding significance is given in National Trust for Scotland, 'Caring for Collections: A Policy to Protect Significance' (2019) but the determination of significance remains with a curator. The latter document can be accessed via: **https://www.nts.org.uk/our-work/collections-policies** (Accessed 03/11/21).

22 National Trust for Scotland, 'Gardens Review: the State of Our Gardens' (2017).

23 Historic Environment Scotland, 'Inventory Criteria' – accessed via **https://www.historicenvironment.scot/advice-and-support/listing-scheduling-and-designations/gardens-and-designed-landscapes/designation-process-inventory-of-gardens-and-designed-landscapes/#inventory-criteria_tab** (Accessed 03/11/21). This highlights that a site's national importance is measured against seven criteria (artistic, historical, horticultural, architectural, archeological, scenic, nature conservation). The integrity of the site is also taken into consideration. There is however, a recognition that the information held within the Inventory can be dated and condition is not specifically integrated.

24 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.

25 National Trust for Scotland, 'Conservation, Learning, Access and Enjoyment Principles' (2018).

26 National Trust for Scotland, 'Conservation, Learning, Access and Enjoyment Principles' (2018)

27 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).

28 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.

29 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).

30 '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.

31 **https://www.befs.org.uk/policy-topics/prioritisation/** (Accessed 20/04/2022)

32 E. Robson, 'Newhailes House and Gardens Social Values Assessment Report' (2022).

33 K. Boal & R. Curtis-Machin, 'Culloden 300: Living with the Battlefield' (2019)

34 BiGGAR Economics, 'Economic Impact Assessment of NTS Proposals for Fyvie Castle' (2019)

35 National Trust for Scotland, 'Conservation Property Acquisition and Disposal Property, 2018' (2018): 2.

36 **https://www.historicenvironment.scot/advice-and-support/listing-scheduling-and-designations/listed-buildings/what-is-listing/#categories-of-listing_tab** (Accessed 28/04/2022)

37 National Trust for Scotland, 'Conservation Property Acquisition and Disposal Property, 2018' (2018): 2.

38 Historic Environment Scotland (HES) states, for example that 'when assessing a monument for scheduling, we consider whether its cultural significance is of national importance' defining cultural significance as 'artistic, archaeological, architectural, historic, traditional, aesthetic, scientific and/or social interest' (Historic Environment Scotland, 'Designation Policy and Selection Guidance' (2019): 9,10 accessed via: **https://www.historicenvironment.scot/archives-and-research/publications/publication/?publicationId=8d8bbaeb-ce5a-46c1-a558-aa2500ff7d3b** (Accessed 04/11/21).

39 Historic Environment Scotland, 'Acquisitions and Release Policy for the Properties in care of Scottish Ministers' (2019): 1 - Accessed via **https://www.historicenvironment.scot/archives-and-research/publications/publication/?publicationid=c64f0f96-20ee-48ca-90ce-aa77008f2cb7** (Accessed 04/11/21).

40 Similarly, although not a specific acquisition strategy, the Strategy for the John Muir Trust 2019-21 made clear the importance the organisation places on ensuring people are connected to, and involved with, the wild places in their care (John Muir Trust Strategy 2019-21, 'Wild Places for People and Nature' (2019) - Accessed via **https://www.johnmuirtrust.org/assets/000/000/574/JMT_Strategy_2019_to_2021_original_original.pdf?1597859254&1555586198** (Accessed 01/02/22). It should also be acknowledged that cultural designations do not carry with them the same requirement for access (Historic Environment Scotland, 'Designation Policy and Selection Guidance' (2019).

41 NatureScot, 'National Nature Reserve Selection Criteria and Standards' (2015): 3 – Accessed via: **https://www.nature.scot/doc/national-nature-reserve-selection-criteria-and-standards** (04/11/21).

42 The National Trust, 'Our Acquisitions' - Accessed via **https://www.nationaltrust.org.uk/features/our-acquisitions** (Accessed 01/02/22).

43 National Trust for Scotland, 'Conservation Property Acquisition and Disposal Property, 2018' (2018): 3.

44 (NTS, 'Facing Our Past' (2021) - Interim-report-on-known-slavery-links-at-NTS-properties-Dec-2021.pdf)

45 The 'Community Engagement: Policy & Guidelines, 2020' note in the opening paragraph 'The National Trust for Scotland exists to promote conservation, access, learning and enjoyment of our heritage across Scotland, and working with communities has always been important to us' (p.1).

46 A wide-ranging example of this is currently being explored by the Church of Scotland in rural settlements where Church Trustees are working with Police Scotland and other interested community parties to identify church sites which could be used as a hub for a wide range of public and community services. Church of Scotland, 'Radical Action Plan – Well equipped spaces in the Right Places Report' - **https://www.churchofscotland.org.uk/__data/assets/pdf_file/0017/58400/General_Trustees_-_Well_equipped_spaces_in_the_right_places.pdf**

47 The process and applicable scale for this is laid out in NTS, Community Engagement: Policy & Guidelines, 2020' (2020). Within the Brodick Castle and Goatfell Forward Plan 2019-24, for example, a key aim is identified as engagement with 'local community and stakeholders' who are identified to include the local Deer Management Group, Visit Arran, Arran Access Trust, Arran Trust, Caledonian Macbrayne, Stagecoach and local businesses.' Key Aim 6: Engage with local community and stakeholders (NTS, 'Brodick Castle & Goatfell: Forward Plan 2019-2024').

48 **https://www.nevislandscape.co.uk/**

49 COSS MODULE FIVE: GOVERNANCE AND PEOPLE COMMUNITY ASSET TRANSFER **https://dtascommunityownership.org.uk/sites/default/files/fileattachments/DTAS%20Workbook%20FIVE_5%20%281%29.pdf**

50 D. Watters & M. Glendinning, Little Houses: The National Trust for Scotland's Improvement Scheme for Small Historic Homes (2006).

51 **https://www.legislation.gov.uk/asp/2015/6/contents/enacted**

52 National Trust for Scotland, 'Conservation Property Acquisition and Disposal Property, 2018' (2018): 2.

53 **https://uk.news.yahoo.com/price-heritage-scotlands-ancient-buildings-060000139.html?guce_referrer=aHR0cHM6Ly93d3cuZ29vZ2xlLmNvbS8&guce_referrer_sig=AQAAAN57_Afwq2hNMKmrHUK0hsguwmKTOJRg3B3dbVlfmIJT4Rvq26hdtOdymYtqXmz5MLc22_GAy0s0FT3aJHwADQ7flx3JsVPuLyO4mGzJ0_Z1teULslm2OonWfwf2IkHHiKW-6tC2gQQrvl8YgkI0t6Gfh4efoE5B8TlC1wg3kpcs&guccounter=2 ; https://www.sundaypost.com/fp/castles-in-decay-main/?utm_source=linkedin**

54 **https://historicengland.org.uk/research/results/reports/8680/IdentifyingOpportunitiesforIntegratedAdaptiveManagementofHeritageChangeandTransformationinEngland_AReviewofRelevantPolicyandCurrentPractice** (accessed May 2022)

55 HES Talking about Heritage **https://www.historicenvironment.scot/archives-and-research/publications/publication/?publicationId=3ff44de6-4154-4e48-bb78-ae8a016c450b**

56 D. Cannadine, 'Why Collect? A Report on Museum Collecting today', Art Fund (2018): why-collect-report.pdf (bigbangartfund-assets.s3.eu-west-2.amazonaws.com): 26.

57 H. Fredheim, S. Macdonald & J. Morgan, 'Profusion in Museums: A Report on Contemporary Collecting and Disposal' Heritage Futures (2018): 16.

58 Examples include the National Mining Museum at the Lady Victoria colliery (**https://nationalminingmuseum.com/**), The Verdant Museum (https://www.verdantworks.co.uk/) in a historic jute mill and the Museum of Lead Mining at Lochnell Mine (**https://www.leadminingmuseum.co.uk/**) (Accessed 12/02/22).

59 **https://www.historicenvironment.scot/archives-and-research/publications/publication/?publicationid=8a0b75d5-0776-4587-8dd5-ae8201362dd4**

60 **https://www.gov.uk/guidance/culture-and-heritage-capital-portal**

61 **https://historicengland.org.uk/research/heritage-counts/2019-carbon-in-built-environment/carbon-in-built-historic-environment/**

62 Guidance on Assessing the Full Economic Benefits of the Productive Reuse of Land.

63 Everyday Heritage Scheme

64 **https://www.churchofscotland.org.uk/__data/assets/pdf_file/0017/58400/General_Trustees_-_Well_equipped_spaces_in_the_right_places.pdf**

65 **https://www.landschaftspark.de/**

APPENDICES

ASSET DATA TABLES

ASSET TYPE	INFORMATION		RECORDS CONTAIN						
	Source	Related Standards / Links	Name/ Identifier	Location / GIS	Age	Condition	Use (where relevant)	Copyright known / held	Significance Assessment
Built Estate *(1179 built structures)*	Built Estate Asset Register	National Register of Listed Buildings/ National Buildings at Risk Register/ Canmore (photographic record)	●	◒	◒	◒	●	N/A	●
Nature Conservation *(Natural Capital)*	Assessment for individual properties	Natural Capital Research	●		NA	Assessment informs understandings of condition	●	N/A	N/A
Nature Conservation	Assorted	NatureScot Condition Monitoring Program	●	◒	N/A	◒	N/A	N/A	●
Museum Object – Collections *(c. 140,000)*	Collections Management System (CMS) - Axiell Collections Objects module	SPECTRUM Bsi PAS197:200	●	●	●	●	●	●	◒
Books *(c. 80,000)*	Collections Management System (CMS) - Axiell Collections Library Module	Various book cataloguing standards	Much of the book collections is catalogued in card indexes, spreadsheets and on Axiell Collections library module. However, the cataloguing methods used are not compliant with current cataloguing standards, there are no consistent shelf marks in place, and some library collections have not been catalogued.						
Archives *(c.75,000 items digitised with focus on the Canna House archive)*	Collections Management System (CMS) - Axiell Collections Archive Modules	ISAD(G) cataloguing standard	●	●	●	●	N/A	●	
Collections Images *(c.250,000)*	Digital Asset Management System (Portfolio DAMS)	Various digital asset metadata standards	●	●	●	N/A	N/A	●	N/A
Corporate Photographic Archive Catalogue *(c. 80,000 images)*	Digital Asset Management System (Portfolio DAMS)	Various digital asset and metadata standards	◒	◒	●	N/A	N/A	◒	N/A
Other Digital Asset Collections *(digital media focus)*	Potential to develop the Portfolio DAMS to manage								
Archaeological Sites *(c.11,000 – includes Designated sites, those within Battlefields and Gardens and Designed Landscapes and undesignated sites)*	Archaeological Resource for Properties; Internal GIS and NTS SMR	Canmore, Pastmap and CIfA	●	●	●	◒	N/A	N/A [If photos or plans are put into Canmore they are generally no longer NTS copyright]	●
Plant Collections *(c. 100,000)*	IrisBG	Demeter (previous database); Legal Requirement to report on plant disease and provenance	◒	◒	N/A	◒	N/A	N/A	

● Information is held for all assets ◒ Information is held for a proportion of assets

ASSET TYPE	COMMENTS ON			
	Conservation	Engagement	Sustainability	GAPS / Representative
Built Estate *(1179 built structures)*	Illustrates variety of type/date/use/ location/ condition which allows for prioritisation at the organisational level.	Informs analysis linked to locational accessibility of sites – additional GIS input would further support this discussion.	Specific financial information captured within Estateman database (sits parallel to Estate Classification Database).	Analysis highlights areas of under-representation (I.e. urban buildings, pre-1700 buildings). Challenging to sit within national context without development of external datasets.
Nature Conservation *(Natural Capital)*	Ability to track change embedded in process. Situate within wider sector discussions and aid advocacy.		Flows captured (i.e. carbon capture) essential to understand organisation's sustainability in the future.	Locate within national thinking & highlight benefits of natural heritage sites.
Nature Conservation	Condition monitoring for sites and species essential to support conservation.	Information captured linked to remoteness of site.		
Museum Object – Collections *(c. 140,000)*	Condition score (1-4) & links to Condition Reports: Supports prioritisation, allocation of conservation spend, the facilitation of loans and helps meet Accreditation standards.	CIIM used to link moveable collections and images with intent for public access. All oil paintings currently accessible via ARTUK; All musical instrument collections available via MINIM.	Knowing what is owned, and location, has improved staff efficiency and paved the way for Review & Rationalisation (in long-term reduces storage costs and improves the quality of the collections cared for).	Collections with the highest significance are primarily those intrinsic to properties. Any collection acquisitions and disposals are guided by the NTS Collections and Disposal policy and, where appropriate, site-specific Collections Development policy statements.
Books *(c. 80,000)*	Vision for Library Catalogue project developed between Collections Team and experts at Edinburgh University Centre for the History of the Book. Desire to run a project, similar to Project Reveal (Museum objects), within the next five years. This project would allow for the auditing of the book collection, support accurate insurance, and explore the potential of the collection for interpretation and research.			
Archives *(c.75,000 items digitised with focus on the Canna House archive)*	Archives Review Project (2022-25) will scope a digital preservation system to conserve the digital archive and reduce the risk of asset loss and obsolescence.	All of the archives are catalogued to some degree. The CIIM will be used as a pilot to create self-service access to heavily accessed elements of the archive to item level.	The corporate archive is a record of the history of the Trust and the Trust's activities. It is frequently used to inform current management decisions.	Digitisation of collections allows increased access but requires significance investment of time and resources. The Archives Review Project (2022-25) will make recommendations on the future digitisation of the archive.
Collections Images *(c.250,000)*	Digital preservation system will be introduced as part of the Archives Review Project and will include preservation of the collection's images.	CIIM used to link moveable collections and images. Currently can be used for research and public interest requests. Will form a key part of developing project to allow online public access to collections.		
Corporate Photographic Archive Catalogue *(c. 80,000 images)*	Digital preservation system will be introduced as part of the Archives Review Project and will include preservation of the collections image.	Dataset currently under review. A Digital Collections Asset Manager in fixed-term post in 2022 is reviewing content, and planning for the future, of the archive.	The archive is a pictoral record of the history of NTS's management of the properties in the Trust's care that complements the paper archive.	The Digital Collections Asset Manager will make recommendations on how to address gaps within the collection, particularly the capture of recent photographic records.
Other Digital Asset Collections *(digital media focus)*	The Digital Collections Asset Manager is currently working to review the corporate use of the Portfolio DAMS and the potential for the Portfolio DAMS to capture digital assets generated by other specialist teams. The project will also focus on the potential for the CIIM to be further developed to improve staff access, and future public access, to diverse digital datasets.			
Archaeological Sites *(c.11,000 – includes Designated sites, those within Battlefields and Gardens and Designed Landscapes and undesignated sites)*	Supports discussion of landscape and change over time. Partnership with Canmore for sharing and safeguarding of data with the wider sector and the public.	Supports public engagement work. Archaeological Research Framework developed 2016.	Partnership with HES has meant a standalone system (with ongoing licence fees) hasn't been required.	Recognition that NTS strong in archaeology relating to Battlefields, Vernacular Buildings, Estate Centres and Designed Landscapes and Coastal and Upland locations. Weaker in urban and large scale industrial landscapes. Internal work completed to situate alongside HES Properties in Care.
Plant Collections *(c. 100,000)*	Tracking conditional change across collections. Legal Requirement for Plant Health & allows for developing partnerships.	Potential for cross-site learning. Highlights challenge of boundaries between gardens & designed landscape (impacts for accessibility & engagement).		Will allow analysis of garden plants data across the NTS. Note potential for integration of garden data with GIS – IrisBG can be adapted to integrate with a GIS system.

ASSET TYPE	REVIEW, ACCESS & ACTIVITY		
	Regularity of review / review planned	Linked Activity	Accessibility of Information? (Internal/External)
Built Estate *(1179 built structures)*	Work recently completed – data management requirements to be defined and resourced.	Natural Capital Framework Estateman Database Condition Monitoring	Internal
Nature Conservation *(Natural Capital)*	In Development.		Internal
Nature Conservation		Conservation Performance Index for Landscape in development.	Internal
Museum Object – Collections *(c. 140,000)*	SPECTRUM process (Object Movement) is in place. Property staff follow this process, working with Collections Team to ensure Axiell records are updated every time an object is moved. Similar processes are in place for reporting loss and damage.	Project Reveal 2017-2019 Maintenance of the database is now embedded in BAU with support from collections team - Training, induction to regional teams, plus access to systems and standardised processes.	Internal (currently) – accessible on Adlib Internet Server interface via TrustNet. Improved access via the CIIM is in development in and will be launched later in 2022. All oil paintings and some sculpture are available online at ArtUK. All NTS musical instruments are visible online at MINIM. NTS in early stage of planning for online public access to collections data using the CIIM.
Books *(c. 80,000)*			
Archives *(c.75,000 items digitised with focus on the Canna House archive)*			Access to archives managed by Trust archivist. Physical archives either stored centrally at Hermistan Quay or at relevant properties.
Collections Images *(c.250,000)*		Project Reveal 2017-2019	Internal – currently via Netpublish accessible via TrustNet. New staff interface is in development using the CIIM to create more user-friendly access to collections data and collections images (see above).
Corporate Photographic Archive Catalogue *(c. 80,000 images)*			Internal – currently via Netpublish accessible from the front page of TrustNet.
Other Digital Asset Collections *(digital media focus)*			
Archaeological Sites *(c.11,000 – includes Designated sites, those within Battlefields and Gardens and Designed Landscapes and undesignated sites)*	New work is submitted annually to Discovery and Excavation in Scotland and then added to Canmore by HES. Condition updated as capacity.	Condition Monitoring Coastal Erosion project Interpretation projects	Internal Canmore and Pastmap are both accessible externally both by the public and by our staff and members.
Plant Collections *(c. 100,000)*	In Spring 2022, Project PLANTS (3 year project across 39 gardens) launching (based on pilot in 2021). Once project is complete regional gardening teams will take responsibility for updating records, overseen by the Curator of Plant Collections. An annual audit process will be developed.	In Development (with learning from process of Project Reveal).	Internal

DATA TABLES SUPPORTING THE VALUES FRAMEWORK GRAPHIC

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	Engagement, Sustainability	• 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	Conservation	• 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)	

Engagement Sustainability Conservation

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		• Existing Management Plans/ Property Statements & Archeological & Historic Landscape Surveys • Information collected for Designations (see 'Asset Specific' for specifics) and declaration of Inalienability where appropriate	Buillt 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 Landcapes: 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.

Engagement Sustainability Conservation

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	**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 peiple, 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).

Engagement Sustainability Conservation

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	**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 dvelopment (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.	

● Engagement ● Sustainability ● Conservation

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		Accessibility Guides (where developed): Website/Staff consultation if not; Demographic information from Visitor Surveys Assessments of accessibility should, where possible, recognise the combination: • Accessibility of Location (to public and private transport as well as for active travel) • Physical Accessibility of site (parking, level access, accessible toilers, 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		The Social Value Toolkit, recently piloted at Newhailes, provides insight into how accessible the site is perceived to be by its local community An Audit Tool/ Standardisation Template for site-specific Site Access Statements is under discussion Increased digital analytics can be incorporated into information collated	

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).

Engagement Sustainability Conservation

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]	High: This site/ asset contributes significantly to learning across a wide range of learners (both formally and informally) None: This site/ asset contributes little or nothing to formal or informal learning	Engagement, Sustainability	Site specific information related to: • 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 Information related to Learning captured within Visitor Surveys Site-specific skills development for staff and volunteers (particularly related to traditional skills etc)	It may be useful to place this information within the context of the information captured within the Socio-Economic Impact assessment Report (2021) . 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: • Historic Houses & Palaces: 71% • Castles/ Forts: 42% • Heritage Centres: 83% • Gardens: 25% • Other Historic Properties: 52% • Outdoor Nature Attractions: 26% • Industrial/Craft: 78%	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	Recognised that assessments of intepretation and learning opportunities can be challenging to seperate from subjective assessments of quality. Subjective information would benefit from additional input (i.e. in workshop format) to ensure consistency and Portfolio-wide perspective

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)).

Engagement Sustainability Conservation

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: • Site-specific partnerships • Organisation-wide partnerships with direct implications for the site Consideration should also be given to the strength and length of time over which partnerships have existed. Mapping exercise with site staff to reflect range of partnerships currently in place at the site		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.	

● Engagement ● Sustainability ● Conservation

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*	
Economic	**Growing Support**	The extent to which the site/ asset is central to the organisation's profle 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: • 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			

● Engagement ● Sustainability ● Conservation

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*	
Environ-mental	**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	● (Sustainability)	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	

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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*	
Environ-mental	**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	High: This site/ asset is at significant risk from the impact of climate change and other external factors None: This site/ asset is not at specific risk from the impact of climate change and other external factors	●	This measurement should take into consideration the At Risk Matrix, developed in alignment with the methodology depveloped with Historic Environment Scotland (HES), the National Trust and 3Keel. This Matrix is divided into four categories, ranked currently and for future potential across: • Overheating & humidity • Storm Damage • Slope Failure • Soil Heave Other factors may include live planning applications and related landscape imapacting works. Additionally any collected information related to pests/invasive species and diseases which negatively impact the site	Natural Estate: The developing Natural Capital data includes information related to soil erosion prevention and flood risk reduction Individual site and species plans e.g. for seabirds and arctic alpines Planning applications - tracked through Local authority portals	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	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.

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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*	
Environ-mental	**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 consitent 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.
Environ-mental	**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 occuring 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	

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			(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*	
Environ-mental	**Adaptability**	The extent to which the site can be adapted or re-interpreted to suit developing need[5]	High: This site/ asset can be adapted to suit current and future need None: This site/ asset either cannot adapt or there is little or no demand for its adaption		Range of current use, Range of potential changes of use, potential for asset re-interpretation	Built Estate: Range of Current Use captured in the Estate Classification Database Natural Estate: Range of current use captured in Natural Capital Framework		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 compatable 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).

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Portfolio Review

Insights, Values & Evaluation