



OPERATIONAL POLICY AND PROCEDURES

PROPERTY ACQUISITION POLICY

Date of Last Revision: 13 August 2012

POLICY: Policy; the National Trust of Australia (WA) will acquire real property, in accordance with this policy, assessed on a case by case basis.

Under the National Trust of Australia (WA) Act 1964 the Trust is provided with the power to acquire, hold and dispose of real and personal property and may accept gifts of any real or personal property.

The National Trust may “acquire by purchase, exchange, gift, devise, bequest, lease, hire or otherwise any real or personal property in furtherance of the objects and purposes of the Trust”.

The Trust in Western Australia acquired its first property in 1964 and over a period of the next four and a half decades acquired properties on a case by case basis.

As the National Trust of Australia (WA) is both a Trust for the Community and Government, it must be both proactive and reactive to various needs of these bodies as well as its own strategic plan.

PROCEDURES:

When presenting real property for acquisition to the Council of the National Trust, the following summary shall be provided as background material and values assigned accordingly:

• Heritage significance	20%
• Economic sustainability(including capital and ongoing maintenance requirements and additional sources of funding)	20%
• Conservation status (physical condition of fabric/landscape, etc)	15%
• Education, interpretation and learning values (actual and potential)	25%
• Social values (visitation, community support, public need/expectation)	20%
Total	100%

A general background paper will be prepared for each property including the above matrix which will refer to relevant policies and provide an overview of how a new property fits into the overall portfolio (strategic plan). This paper will also assign the new property to a defined category within the Trust's portfolio.

A separate business plan for each property will also be considered.

Any assessment will be provided to the Minister for Heritage, prior to consideration by Council.

COMPLIANCE:

The property considered will be reviewed by both the Finance and Audit Committee and the Trust Executive before presentation to the Trust Council.

RELATED POLICIES:

The Council adopted the *Property Review of 2011* which includes the following (in no order of priority): Additional information about the history of acquisition of Trust places can be found in this document.

- The Burra Charter
- The Australian Natural Heritage Charter
- The Australian Historic Themes Framework
- The Conservation Plan
- WA Treasury Business Case Guidelines
- Sharing Our Stories Document
- The National Trust Management Model, including the heritage place management categories
- Collections Policy

INFORMATION TO BE PROVIDED

Any benefactor of property to the Trust shall be informed of the Trust's Statutory nature and nongovernmental status.

Any person or party considering selling, gifting and the like property to the Trust, shall be informed of the Trust's power to sell or dispose of property under section 20 of the National Trust of Australia (WA) Act.

BUSINESS PLAN TEMPLATE

The attached Business Plan template will be utilized in the assessment process.

PUBLICATION OF POLICY

The Property Acquisition Policy of the National Trust (as amended from time to time) shall be published on the Trust's Web Page.

APPROVED BY COUNCIL: 13 August 2012



Thomas E Perrigo
Chief Executive Officer
National Trust of Australia (WA)

CONTROL AND REVIEW SCHEDULE

First Approved	12 March 2012
Periodic Review	Every Three Years or at Council's discretion
Next Review Date	9 March 2015
RecFind File No:	
RecFind EDOC No:	