ANNUAL REVIEW 2012/2013

FROM THE PRESIDENT
IAN CARROLL OAM

Dear Members,

In the light of the economic and the climate which has prevailed since the global financial crisis, Trust CEO, Brian Scarsbrick AM, with invaluable support from Trust Treasurer, Neil Wykes OAM, and Finance Manager, Soma Somavarman, is to be congratulated on producing a balanced operational budget for 2013/14. This is the Trust’s first balanced budget for nine years. It arrests a downward trend which could not be allowed to continue, and will inject optimism and confidence in the future, albeit cautiously, throughout the Trust.

Trust revenue will be augmented over the next two years by an allocation announced by the NSW Minister for Environment and Heritage, the Hon Robyn Parker MP, of $800,000 in 2013/14 and $150,000 in 2014/5. While it is a matter of concern that the NSW Government is paring back expenditure on funding for heritage, I believe we can regard this allocation as an endorsement of the strong remedial steps which your Board is taking, and of the effectiveness of the National Trust in managing our very considerable commitments to heritage. These include our responsibilities regarding 33 of the nation’s most significant properties and some 60,000 collection items.

Despite widespread trends to the contrary with house museums feeling the pressure of declining sponsorship and government funds to augment the considerable costs of their conservation and maintenance, our National Trust museums and galleries have achieved a significant financial turnaround this year. Whereas in 2011/12 only 5 of the 18 properties open to the public produced a surplus, 2013/14 saw 12 properties budget to produce a surplus! While cuts in non-essential expenditure have been an important part of the story, staff and volunteers at properties across the state have considerably increased their programs of events this year, as our branches and committees have also done. This has increased revenue which brings more visitors to properties and encouraging membership.

All are to be thanked and congratulated for their initiatives and hard work.

In addition to cuts to non-essential programs and works, staff levels have been cut by 73% over the past two years. Staff innovation and dedication have been tested to the limit to maintain the efficient and effective running of the Trust and, on behalf of the Board, I thank our staff throughout the state.

The strengthening of the Trust’s financial position is particularly important given the context within which we now operate. In addition to direct threats to heritage (such as are outlined in our Conservation report on page 4), current changes to planning legislation to allow the over-riding of the Heritage Act while reducing opportunities for community consultation and involvement in relation to heritage and the environment, are clear indications of the need for a strong, independent National Trust.

Our strength has increased this year, due to the dedication and tenacity of all who work for and with us. As always it is you, our National Trust members, who have supported the Trust unstintingly – with your subscriptions, donations, your voice and your commitment – who are deserving of the greatest accolades. The National Trust Board and I thank you most sincerely.

Ian Carroll OAM

FROM THE CEO
BRIAN SCARSBRICK AM

Hi All,

After a number of difficult years for the Trust which saw a steady decline in our cash reserves, I am delighted to report that we have developed an achievable balanced operational budget for 2013/14. This has been achieved by measures which include reducing expenditure but also, most promising for the future, by increasing the self-sufficiency of our properties and revenue raising income streams.

Restraint in non-essential expenditure has achieved further operational savings over the previous year. Programs and staff levels have been reduced but our traditional roles of advocacy, essential conservation and property maintenance have been retained with an increased priority on volunteer training and involvement. This has ensured that some of our properties throughout NSW (with grants and bequests) have never looked better!

The sale of the 99 year lease of Juniper Hall at the beginning of the 2012/13 financial year allowed the Trust to produce an accounting surplus of $1.58m and establish the National Trust Heritage Foundation, to provide an essential buffer and investment income for the ongoing sustainability of the National Trust of Australia (NSW) into the future. At the same time, it has ensured the ongoing maintenance of this highly significant property to levels the Trust is unable to afford while providing for periodic public access to the ground floor as an art gallery. The 33 properties currently in the care of the Trust all place critical pressure on the Trust’s limited resources. The Properties Taskforce is reviewing all properties with respect to their ongoing sustainability and contribution to the objectives of the National Trust.

The Trust ran the first in an ongoing program of property-based regional workshops towards the end of 2012/13 to share the wealth of experience and expertise we have around the state and add practical advice and support to help properties balance their budgets.

I thank all our hard working property managers, management committees and volunteers wholeheartedly for their commitment and outstanding results.

Revenue has increased from a number of sources. A strong focus on community partnerships in the regions has helped to develop events and other community involvement in our properties which are compatible with their heritage (such as the new emphasis by local produce and markets taking root at Riversdale), while also supporting local tourism and business. These initiatives will be crucial in helping us produce a budget of $450,000 for conservation works during the coming year. Additional funding has been provided to fund the National Trust Heritage Festival and Awards, and our uniquely important Cemeteries Advisor role, for a further two years.

This year we have made it a priority to develop and promote National Trust merchandise. It is vital for the future that we strengthen entrepreneurial revenue streams to reduce our dependency on fundraising and other measures of support which are subject to pressures beyond our control. Books, children’s items, and our attractive new range of soaps and luxuries celebrating our founder, Annie Wyatt, are proving popular. They and merchandise available from other Australian Trusts can be purchased on our new-look website. The website is a vital way for the Trusts to ‘sell’ themselves, making it easy to join and renew membership, order merchandise, galvanise support for campaigns and see at a glance what is going on at properties. In NSW we also use email to give members monthly electronic updates on Trust issues, events and fundraising campaigns. We urge all members who have access to the net to register for our e-news, which is free of charge.

On the broader perspective of the heritage system itself, the NSW Government’s proposed changes to the NSW Planning Laws contain some assurances about heritage protection and its role in the planning system. However, the proposed new legislation endangers economic growth as a guiding principle and limits the rights of communities to challenge so-called ‘complying development’ on heritage and environmental grounds.

While acknowledging that some of the reforms have merit, the National Trust joins a chorus of protest at the proposed legislation from a wide range of community and environmental groups.

It is pleasing that a Heritage Policy is being developed by the NSW Government to complement their Planning reforms. As I write, we have been advised that the Minister has responded to the number of concerns raised in the submissions on the White Paper by deferring the tabling of the Bill until certain elements have been redrafted. However, I echo the words of our President, Ian Carroll, who in his message to you has reiterated clearly the importance of the Trust as an independent, community-based body able to advocate without fear or favour on behalf of heritage. I too thank you, our loyal members and supporters, for helping us to maintain this vital role, and look forward to building an ever stronger National Trust.

Brian Scarsbrick AM
ANNUAL REVIEW

ENVIRONMENTAL HERITAGE

The Bushland Management Services of the National Trust is a commercial enterprise providing high-quality and innovative range of environmental restoration services to land management agencies across Sydney. Bushland remnants are a part of Sydney’s natural heritage and, on any given day, up to five teams of trained and dedicated National Trust bush regenerators will be busy reversing the impact of decades of neglect.

Over the year 2012-13 the Bushland Management Services successfully completed 100 contracts with 16 local councils and a number of other public and private land owners. In addition, National Trust bush regenerators provided supervision for weekend teams of dedicated volunteers from all walks of life who come along each month to Bushcare sites across Sydney – a great way of sharing enthusiasm and involvement.

The BMS also carry out Bush Regeneration projects on the selected National Trust-owned properties that contain bushland with significant flora and fauna. These sites are Stella James at Avalon, Ahimsa House at Burrawang, Easton at Brushgrove, and the Manly peninsula National Park.

As a combined project with other State and Territory National Trusts, the National Trust bush regenerators provided supervision for weekend teams of dedicated volunteers from all walks of life who come along each month to Bushcare sites all over Sydney – a great way of sharing enthusiasm and involvement.

We are working toward expanding this program further over the next two years.

The 2013 Summer Appeal raised significant funds toward the conservation of Experiment Farm Cottage, the first settlement site in what is now Sydney, on Sydney Harbour. The cottage is a key piece of Sydney’s heritage and is currently a dearth of industry competition. As the satellite towns of the Sydney Metropolitan Area are now recognising that Sydney continues to expand at its farthest edges, the Trust is seeking to provide services to clientele across a greater geographic area, recognising that Sydney continues to expand at its farthest edges. The Trust seeks to expand its operations to other locations in regional New South Wales.

We will seek opportunities in areas where there is currently a dearth of industry competition. As the satellite towns around Sydney also expand, similar business opportunities will be sought.

GERRY HAYES - PROPERTY DIRECTOR

At a time when museums and galleries in general are experiencing increasingly difficulty in attracting visitation and revenue needed for their continued existence, the National Trust has achieved an outstanding result with 12 of its 18 properties open to the public returning a surplus. This is an increase over 2011/12 when five properties returned a surplus and represents tremendous effort and commitment from Management Committees, staff and volunteers.

Restraint in non-essential expenditure was balanced by increased involvement from volunteers who carried out maintenance, helped to re-establish heritage gardens, formed partnerships with community cultural and tourism initiatives and ran regular exhibitions and displays. The annual Lindsay Christmas Fair was again a highlight of the year, augmenting the significant funds raised by the National Trust Women’s Committee.

Notable projects completed during the year include extensive conservation works at Experiment Farm Cottage, which re-opened in July with a celebration of its 1963 opening to the public. This work was funded by the Dame Helen Blaxland Foundation. Other projects included the restoration and repainting of the Painting Studio at Norman Lindsay Gallery funded by a Community Building Partnerships grant and a generously supported membership appeal, and the restoration of Jack Haynes Cottage at Saumarez Homestead. This was carried out largely by volunteer labour supported by a grant from the Copeland Foundation. Many smaller projects were completed during the year thanks to the generosity of individuals and organisations.

The NSW National Trust holds 33 properties and some 60,000 collection items in trust for the nation. As a not-for-profit organisation which receives only a small proportion of its income from government through grant programs, this asset portfolio places enormous pressure on the Trust’s very limited funds. Our aim is to achieve self-sufficiency in all properties open to the public as museums and galleries.

To share the specialist experience and knowledge which is helping many properties to achieve their financial and activation targets, the Trust conducted a number of workshops during the year. The first in December was attended by representatives from all properties. This was followed up with more focused and detailed workshops conducted in the Hunter Valley and later in Goulburn, dealing with wide ranging topics including event planning, maintenance management, local community engagement, risk management and volunteer involvement. A workshop specifically aimed at collection management for volunteers was also held at Observatory Hill.

Saumarez Homestead launched a series of volunteer workshops providing practical, technical and heritage information specific to Saumarez; a model which will be taken up by other properties.

During 2012-13 the Trust has partnered with the Australian Council of National Trusts to develop a small number of pilot education programs specific to new Australian Curriculum for primary and secondary schools.

We are working toward expanding this program further over the next few years.

Our two galleries, S.H. Ervin Gallery and Norman Lindsay Gallery, maintained their high profile with changing exhibitions supported by cultural, educational and other events to attract people of all ages.

The S.H. Ervin Gallery celebrated its 35th anniversary this year. Exhibition highlights included Salon des Refusés and the 150th year of the Holding Redlich People’s Choice Award held in conjunction with the exhibition. A fundraising dinner was held in the Gallery.

Other exhibitions included the annual Portia Geach Memorial Award in (Two Art) from Maitland Regional Art Gallery; The Blake Prize; Angus Nivison: A Survey toured by Tweed Regional Gallery; Capturing Fire: a Passion for the Exotic at S.H. Ervin Gallery of Ballarat exhibition, and David Boyd: his work, life, his family which was facilitated by Eva Breuer Art Dealer. Exhibitions were supported by well-attended public programs and events including art master classes and studio tours.

The Gallery was closed from May to July 2013 to allow an upgrade of its air-conditioning systems to meet international museum standards, replacement of the crumbling sandstone parapet and exterior painting of doors and windows, all carried out by the NSW Government’s State Property Authority.

The Norman Lindsay Gallery will celebrate 40 years of opening later in 2013 with a special look at the exhibitions and events that have taken place over the years. Exhibition highlights during the year included the Howard Hinton Collection of Lindsay works, in association with NERAM. To commemorate the 40th anniversary, the Trust has produced the third and final Norman Lindsay limited edition vase for collectors.

The 2013 Summer Appeal raised significant funds toward the conservation of works in the S.H. Ervin Gallery Collection. Charles Meere’s works, Atlanta’s Eclipse and Tiptop, two of the most valuable and significant pieces in the collection, are currently undergoing conservation work at International Conservation Services.
OUR PEOPLE

Mrs Leone Steele
Mrs Susan Maude
Mrs Margaret Neyle
Mrs Wendy Walker

Trust Commendation:
Mr John Birch AM
Ms Alison Affleck

New South Wales. In 2012 the following volunteers were recognised at the AGM for their exemplary service to the Trust:

- Saumarez Homestead Advisory Committee
- After Hours Committee
- Women’s Committee
- Landscape Heritage Conservation Committee
- Miss Traill’s House/Central West Women’s Committee
- Friends of Grossman House
- Friends of Tomago House Management Committee
- Misses Trail’s House/Central West Women’s Committee
- Plowman: Riversdale Homestead Advisory Committee

NATIONAL TRUST AWARDS TO VOLUNTEERS

Honorary Life Membership:
Ms Alison Affleck - Saumarez Homestead Advisory Committee
Mr John Birth AM - Chair, Sydney Cottage Management Committee

Trust Commendation:
Mrs Wendy Walker - Parramatta Regional Branch
Mrs Margaret Nevile - Parramatta Regional Branch
Mrs Virginia Pearson-Smith - Women’s Committee
Ms Pamela Brauer-Hollins - Saumarez Advisory Committee
Mrs Susan Maude - Southern Highlands Branch
Mrs Leonie Steele - Bathurst & District Branch / Miss Trail’s House Management Committee
Ms Elyne Downey - After Hours Committee
Ms Tamara Lavinenc - Curatorial Committee

Voluntary Service Award:
Ms Kay Lowe - Saumarez Homestead Advisory Committee
Mrs Elizabeth Davis - Saumarez Homestead Advisory Committee
Ms Lynn Morris - Friends of Grassman House
Mrs Colleen Morris - Landscape Heritage Conservation Committee
Ms Fay Woolley - Friends of Tomago House Management Committee
Mrs Jennifer Paton - Miss Trail’s House/Central West Women’s Committee
Dr Sian Graham - Women’s Committee
Ms Susan Hoppe - Landscape Heritage Conservation Committee
Ms Christa Ludlow - Landscape Heritage Conservation Committee
Miss Helen Lloyd - Women’s Committee
Mrs Elizabeth Nock - Women’s Committee

OUR STAFF

The National Trust of Australia (NSW) continued to rationalise its staffing levels throughout 2012/13 with National Trust Centre experiencing the reduction in staff. Despite this, we are committed to delivering great experiences, events and activities to our members to a revitalised approach to partnership programs with local communities and our branches and committees. From Bathurst to Nowra to Dubbo to Darling Point, people everywhere are working towards building a stronger and more vibrant Trust community.

Every year at the AGM the Trust recognises its most outstanding staff member. In 2012 the Staff Distinguished Service Award was presented to Ms Lin Henry from Old Government House in recognition of her outstanding contribution to the Trust through her dedication, initiative, knowledge, enthusiasm and attitude in her work.

We are indeed fortunate to have a strongly dedicated staff base that has risen to the challenge of doing more with less and we gratefully acknowledge and thank all who have worked so hard to build up the Trust again. Without their passion, generosity and commitment none of these initiatives would have been possible.

OUR MEMBERS

In 2012/13 the Trust invited its members to engage in a wider range of activities than ever before, with a diverse range of activities for all the family. From Teddy Bears Picnics to Heritage Fairs and exclusive dining experiences in support of local produce, we have worked hard to bring our properties alive. Due to a number of membership initiatives we have had a significant increase in new memberships and member renewals through our online shop, reflecting a wider acceptance of the electronic medium; however we recognise that many members still enjoy their Trust magazine in hard copy so the NSW Trust Magazine was reintroduced in May with 14,000 copies being distributed state-wide.

Being a National Trust member gives you exclusive benefits, such as invitations to the highly popular house inspections and country weekends run by the National Trust Women’s Committee, free entry to National Trust properties worldwide and discounts on Trust events and merchandise. This year saw the introduction of a National website which allowed the development of a much stronger online presence for renewal of membership and online shopping. We have also ventured into the social media realm of Facebook, Twitter and Pinterest to entice younger visitors to engage with our properties.

OUR VOLUNTEERS

The National Trust’s team of around 2,000 volunteers is one of our greatest assets. The volunteers are a wonderful frontline at our properties and events, in our gardens and cafes, while at properties, and through branches and committees they provide valuable assistance with campaigns, research and professional knowhow.

Keeping our volunteers busy is easy, but we place high priority on giving them the training and information they need to obtain maximum enjoyment from their relationship with the Trust and make a difference to what we can achieve. This year saw the first of an ongoing program of property-based workshops bringing representatives from properties, branches and committees throughout New South Wales, to learn from a two-day program of presentations while sharing invaluable expertise and experience. A number of property-specific training and information sessions are also being developed covering topics from local history, heritage significance, guiding tips, and risk management.

OUR PARTNERS

The National Trust as a not-for-profit organisation relies very much on the support it receives not only from members but also business and community partnerships and government grants. We partner with organisations that bring reciprocal benefits to our members and a special thank you must go to the NRMA and Aurora Expeditions for significantly boosting our membership numbers in 2012

Funding bodies for 2011/12 were: Heritage Council of New South Wales; NSW Office of Environment & Heritage; The Department of Sustainability, Environment, Water, Population and Communities; Museums and Galleries NSW.

OUR SUPPORTERS

Our principal supporters were Clayton Utz, Eakin Mc sweeps, Gooding, the Arts; Holding Redlich Lawyers & Consultants; International Conservation Services, Grays Online, The Wine People, The Trust Company of Australia and The Langham Hotel.

Our Corporate supporters are also a valuable source of support with Allen Jack & Cattell, Wollongong City Council, Design 5 – Architects Pty Ltd and Cox Architecture holding Silver Memberships, Tenx Pty Ltd, Johnson Pliton Walker Pty Ltd and Winten Property Group holding Gold Memberships and FDC Construction & Fitout Pty Ltd being a Platinum member. A full list of all supporters can be found on the back cover of each issue of the NSW National Trust Magazine. We would also like to thank our members for their overwhelming support and generosity in our last General Appeal. This has been the most successful appeal the Trust has run in many years and your continued encouragement and commitment to what we do is evident in the ongoing strength of our Regular Giving program, renewed memberships and increased visitations.

A YEAR OF EVENTS AROUND NEW SOUTH WALES

Events organised by National Trust properties, branches and committees around the state helped 12 of our museums and galleries to achieve a surplus for the year, as well as playing an important part in attracting tourism and new memberships. A number of properties held special events to celebrate landmark anniversaries in Trust ownership. All major properties held well attended events for families, while many ran regular events taking advantage of heritage gardens, local produce and linking with cultural events. Special thanks are due to the National Trust Women’s Committee whose popular house inspections, annual Lindsey Christmas Fair and other events were again a major contributor to National Trust fundraising.

Currently in its 33rd year, the National Trust Heritage Festival is the longest-running community festival in NSW. This year’s theme There’s Nothing Like Australia: Community Milestones inspired around 300 events throughout the state and brought many Indigenous and multi-cultural groups into the Festival for the first time.

The National Trust Heritage Awards attracted 72 entries across 11 categories. Chaired by architect Jacqui Goddard, members of the judging panel were Helen Wilson, ICOMOS, Murray Brown, AIA, Tim Smith, NSW Heritage Branch, Robyn Christe, National Trust Board; Graham Quint, National Trust Conservation Manager and Brian Scarpbrick, National Trust CEO. Special guest at the Presentation of Awards ceremony in May was the Hon Robyn Parker, NSW Minister for the Environment and Heritage.

Individual Awards were as follow: Trade Skills Award - NSW Public Works, Heritage Services, Cathy Donnelly Memorial Award – Letitia Coppo Jones, National Trust Lifetime Award – Joan Dallmeyt AM

The National Trust gratefully acknowledges its generous sponsors and supporters of the event.
FUNDRAISING + EVENTS

GRANTS

The National Trust received a total of $372,298 in grants during 2012/13 across a broad spectrum of works and community events.
These were:

- NSW Office of Environment & Heritage (Heritage Branch) $278,440 under the 2011-2013 NSW Heritage Grants Program towards the 2013 National Trust Heritage Festival, Cemeteries Conservation Advisory Service and to undertake conservation and repair works at Experiment Farm Cottage, National Trust Centre, Norman Lindsay Gallery, Grossmann House and Brough House.
- Department of Sustainability, Environment, Water, Population and Communities $62,133 under the 2012/13 National Trust Partnership Program (in partnership with the Australian Council of National Trusts) towards national heritage, education and cultural initiatives.
- The Copland Foundation $10,000 to allow the repair and restoration of Jack Haynes Cottage, Saumarez.
- Other financial assistance was provided by the Department of Families, Housing, Community Services and Indigenous Affairs; Museums and Galleries NSW; Bathurst Regional Council; Maitland City Council; Wingecarribee Shire Council; Yass Valley Council; Garden Australia and Buchtel Pty Ltd towards equipment, events and works at properties.

NEW TRUST POLICIES TO ADDRESS CHANGE

BY GRAHAM QUINT, CONSERVATION MANAGER

Over many years the National Trust has adopted various policies on the conservation of our built and natural heritage. One of the earliest, the 1974 Policy on National Parks, pre-dated the establishment of the National Parks & Wildlife Service. The National Trust was formed in 1945 on the model of the National Trust in England, Wales & Northern Ireland, which owns and manages coastal, moorland, forests and nature reserves. Following the establishment of the National Parks & Wildlife Service, the Trust passed to the Service responsibilities for coastal land, bushland reserves and Aboriginal sites which it had been managing.

The National Trust has a long history and special interest in the establishment, management and public use of the NSW parks system and the protection of both its natural and the built heritage. It is empowered by the National Trust Act to encourage and promote, by any means whatever, public appreciation, knowledge and enjoyment of, respect for, and interest in, such lands.

In the main, the 1974 Policy’s provisions have come to fruition. However in recent times the very purpose and management strategies of National Parks, Nature Reserves, Historic Sites, Wilderness Areas, World Heritage Areas and State Conservation Areas are being disputed. Such challenges to the destruction and conservation of the natural and the built environmental heritage have led the Trust to revise many of its own policies developed over the past 40 years and, where necessary, to develop new policies. The Board of the National Trust has established a Conservation Policies Task Force to oversee this task. As new policies are adopted by the Board, they will be placed on the Trust website and publicised in the regular Heritage Alert E-newsletter.

New Policies adopted by the Trust Board include:

- NSW Parks System
- Heritage Legislation
- The Impacts of Coal Mining

Coal mining is a particular example of how changing practices create new pressures, in this case social as well as environmental. Consequently, new policies are needed to achieve a balance which protects significant lands and social significance, while recognising the value of what has traditionally been a source of employment and revenue in New South Wales.

The Trust’s Impacts of Coal Mining Policy notes that the coal industry has long been recognised by the National Trust as forming part of the heritage landscape of the present. Many historic coal mines and their associated structures and machinery are listed on the National Trust Register for their historic and scientific values. Coal mining has played a key role in the history of European settlement in Australia and these listings reflect this historical and technological significance. Nonetheless, this industry has significant and other detrimental side effects. In the Hunter Valley, 17 Landscape Conservation Areas were listed on the National Trust Register for their scenic, agricultural, historic and nature conservation significance. Coal mining has threatened the heritage values of a number of these areas. The Trust’s Ewer/Sutton Forest Landscape Conservation Area also contains 43 properties individually listed on the Trust Register and is currently under threat from coal mining operations.

The Impacts of Coal Mining Policy sets out the Trust’s position in regard to open cut and ‘long wall’ mining where places of heritage significance may be threatened. It will underpin submissions on coal mining development proposals and Trust action to protect important places threatened by these mining operations.

FINANCIALS

SOMA SOMAVARMAN

The Trust’s financial performance and financial position continued to improve in 2013 and is budgeted to improve further in 2014.

The Trust reported a surplus for accounting purposes of $1,585,968, compared with a deficit of $1,757,673 in 2012. This Surplus included the profit on sale of the lease on Juniper Hill of $2,420,779.

The amount of cash used by the Trust has continued to reduce. This has resulted from $4,336,429 in 2011 to $2,262,991 in 2012 to $1,392,128 in 2013. Similarly the Operating Deficit after investment income has reduced from $2,277,095 in 2011 to $1,764,825 in 2012 and down to $1,233,493 in 2013. The budget for 2014 is broken out.

During the financial year and subsequent to year end, the Trust continued to make changes to its business model and this has resulted in the Trust now having sufficient ‘untied’ cash reserves to continue as a going concern. These changes have significantly reduced the consolidated entity’s cash base and have projected increased income in future years. The business model going forward, in addition to improved performance from existing operations, will involve the derivation of investment income from capital Funds established from the proceeds of asset sales and from donations and bequests and will be based on a much smaller number of paid staff, supplemented by volunteers.

The major changes have been as follows. The Trust:

- Reduced full time equivalent staff from 62 (Observatory Hill 24.0) at 30 June 2011 to 37 (Observatory Hill 18.5) at 30 June 2012 and to 31 (Observatory Hill 13.2) at 30 June 2013
- Set up a Foundation into which the majority of the proceeds from property sales are to be sold. A Second Foundation was also set up for major donations and bequests where the donor requested that the capital be preserved. For legal reasons, two funds were necessary, but the intent of them are the same, namely raising funds to produce future investment income streams to support the work of the controlled entity.
- Obtained Grants from the NSW Gov. of $351,000 for 2013 & $600,000 for 2014 to assist in the maintenance & upgrade of properties
- Sold a 99 year lease on Juniper Hill for $4,551,000, of which $3 million has been placed into the National Trust of Australia (NSW) Heritage Foundation to ensure that the capital will be preserved
- Continued to examine properties with a view to selling leases to provide funds for the National Trust of Australia (NSW) Heritage Foundation and the operations of the Trust
- Entered into commercial leases for unused space in a number of properties.
- Upgraded properties such as Sau mann, Experiment Farm Cottage and Dundu mallin with the assistance of volunteers, donations, Government and other Grants. This should result in higher visitations and a better chance of the property becoming self-sufficient. This process will continue for these and other properties.
- Held forums for all properties and committees where ideas, strategies and processes for improving the operational performance & appeal of the properties have been discussed
- Implemented a magazine specifically for Trust Members
- Implemented regular eNews, Heritage Alerts and Newsletters
- Listed 30 heritage items on the Trust register
- Produced position papers on 11 matters of Heritage importance, and
- Became the lead Trust for online retailing for all National Trusts in Australia. These changes have allowed the Trust to set a demanding but achievable budget for 2014, which if achieved, will see the Trust break even for the first time many years ago. The budget has been met for the first two months of the 2014 financial year.