



National Trust of Australia (Victoria)
Strategic Plan 2018–2022



Chair's Message

The National Trust of Australia (Victoria), known as the 'National Trust' is the most significant grass roots, cultural heritage organisation in the State of Victoria. We will continue to ably represent the interests of heritage in Victoria through strategically establishing our future directions and working collaboratively with many diverse communities who are as committed as we are to safeguarding our heritage legacy.

I am delighted to announce the recent completion of a rigorous review of our organisation, the outcome of which has been the development of an ambitious and robust 5-year Strategic Plan. This evaluation of the challenges and opportunities has been reaffirming and empowering. Affirming as we recommit to the National Trust's fundamental values and critical efforts to advocate, protect and conserve the best of Victoria's heritage, empowering as we commit to representing the diversity of contemporary Australia. Importantly, the Strategic Plan builds on the remarkable legacy of the National Trust in advocacy and heritage conservation, while mapping a creative and sustainable course for our future.

Driving our Strategic Plan is a focus on expanding the influence and effectiveness of the National Trust to create an even more dynamic, effective, and inter-connected heritage community that share our values, concerns and vision for Victoria's heritage. Our strategy reaches out to all sectors of the Victorian community to be heritage advocates, to be custodians, and to have their daily lives enriched through living heritage.

We are grateful for the extensive consultation and feedback from Branches, staff, volunteers, members, senior leaders, heritage partners and colleagues. Everyone has provided valuable insights, identified opportunities and helped to chart the next phase of the National Trust's life. We thank our key stakeholders, including Government and philanthropic partners, for their contributions and look forward to working together to implement our vision.

We extend an invitation to all Victorians to join us to ensure that our diverse heritage thrives and is an integral part of life today and into the future.

Kristin Stegley OAM

The Future

As the National Trust delivers on its new strategic goals and objectives, we look forward to our members, partners and the Victorian community embracing, empathising and engaging with the National Trust from new perspectives.

We have analysed our operations and have determined a direction that will set the course for a sustained financial legacy, organisational relevance and optimistic future.

We seek to build on existing strong relationships with philanthropic partners, key stakeholders, private sector and Government and take up new opportunities. We will be bold, genuine, responsive and inclusive. Our people (Board, Branches, staff and volunteers) will be provided with the tools and resources required for success.

Our members are crucial to our success. We intend to improve services to members and encourage more Victorians to join our organisation. The membership will reflect the rich diversity of Victoria in urban and regional areas.

Due to our independence we are Victoria's leading heritage voice and can act without fear or favour. This is true of our past and will be into the future. Our independence will be safeguarded as we continue to protect and conserve Victoria's heritage through community activism and our advocacy mandate.

The National Trust is a trusted custodian of many properties, places and collections. We look forward to innovatively activating our assets, prioritising selected sites for re-visioning and investment in conservation and appropriate advancement. We encourage all Victorians to experience, appreciate, be involved and be inspired by the new opportunities.

We will work with communities across Victoria to increase appreciation and celebration of Victoria's diverse natural, cultural, social and Indigenous heritage. Through our properties, places and collections we will tell stories that reveal the rich diversity of Victoria's heritage. Our actions will show our inclusiveness and our commitment to reconciliation.

Guided by our goals and objectives the National Trust will develop and implement annual business plans outlining specific activities and targets, together with the necessary metrics to measure progress. We will continually assess the effectiveness of our actions against these goals, adapt our strategies as required, and ensure we are accountable to our supporters by sharing regular updates.

The National Trust is well positioned to deliver on the Strategic Plan. In some areas, we are entering "uncharted waters" as we envisage new directions and strategic intent, and in other areas we are planning to continue the great work that has gone before us. But in every way, this is a plan for an optimistic organisation and we aim to achieve our goals to ensure that we build a profound legacy for our future.

Simon Ambrose

Chief Executive Officer



Como House School
education program



Water cart, Mooramong

Mission *our reason for existing*

To inspire the community to appreciate, conserve and celebrate its diverse natural, cultural, social and Indigenous heritage.

Vision *our aspiration*

Our diverse heritage is protected and respected, contributing to strong, vibrant and prosperous communities.

Values

our commitment in all that we do

Courage

We learn, change and grow through the feedback we receive and the challenges we face.

Excellence

We strive for outstanding service, visitor experiences and heritage outcomes.

Inclusion

We promote diversity and our shared heritage through sincere and meaningful relationships.

Integrity

We are honest and ethical custodians of heritage.

Respect

We uphold the dignity of individuals and communities and support people to share their gifts and talents.



1

BOLD ADVOCATE AND ACTIVIST

We will be recognised as the State's leading voice for heritage, empowering the Government, property owners, corporates and the community to protect, use and celebrate our heritage.

2

BRINGING OUR STORIES TO LIFE

We will bring our heritage to life through engaging storytelling and providing memorable visitor experiences.

3

BUILDING STRONG AND ENDURING RELATIONSHIPS

We will work collaboratively with key stakeholders and partners to build a shared understanding of the value of our heritage and increase our capacity to protect and celebrate Victoria's heritage.

OUR STRATEGIC OBJECTIVES

6

BUILDING FINANCIAL STRENGTH

We will diversify and grow revenue through activities and engagement with, and secure funding from, philanthropic partners, Government, corporates and other sources.

5

INVESTING IN OUR PEOPLE

We will invest in our people to grow our culture of positivity, engagement, passion, expertise, and accountability, providing a great place to work and volunteer.

4

INNOVATIVE CUSTODIAN OF HERITAGE

We will be trusted leaders in the conservation, protection and activation of heritage properties, places and collections.



Gulf Station repairs, photo by Chris Groenhout



Community protest against the removal of Flemington Road Lemon Scented Gums, 2016.

1 Bold Advocate and Activist

We will be recognised as the State's leading voice for heritage, empowering the Government, property owners, corporates and the community to protect, use and celebrate our heritage.

To be a **bold advocate and activist**, we must be recognised as the State's leading voice for heritage. Support from our members, staff, volunteers and key stakeholders will be pivotal in realising our aspirations.

The National Trust manages a range of ongoing advocacy programs and campaigns to protect Victoria's natural, cultural, social and Indigenous heritage and align with the National Trust's advocacy mandate. Much of our work requires campaigning to influence legislative and planning changes across all levels of Government to protect heritage under threat or at risk. We will strengthen our commitment to Aboriginal Reconciliation as we continue to inspire and work with communities to appreciate, conserve and celebrate our shared heritage.

As a strategic priority, the Advocacy Service will be re-modelled to offer a suite of services for members at no-charge and a fee-for-service arrangement for non-members. This change will enable the Advocacy Service to proactively deliver on its mandate and introduce new ways of growing broad-based community activism.

GOAL 1.1:
ADVOCACY SERVICES MODEL
 Renew our Advocacy Service model and establish networks of influence to increase community activism.

GOAL 1.2:
ADVOCACY CAMPAIGNS
 Achieve through broad-based advocacy campaigning legislative change across all tiers of Government.

GOAL 1.3:
ABORIGINAL RECONCILIATION
 Promote reconciliation, to inspire the community to appreciate, conserve and celebrate our shared heritage.

GOAL 1.4:
BRANCH CAPACITY
 Increase grassroots activism through building Branch capacity.

GOAL 1.5:
NETWORKS OF INFLUENCE
 Actively engage in heritage activism working together with committed heritage stakeholders.

2 Bringing Our Stories to Life

We will bring our heritage to life through engaging storytelling and providing memorable visitor experiences.

We are excited about creating new and vibrant opportunities for people to come to know and appreciate Victoria's heritage. We invite everyone to participate in and enjoy this experience.

The National Trust has some of Australia's most significant and extraordinary heritage sites open to the public in Victoria. These sites are the backdrop to **bringing our stories to life**. Through house museums, exhibitions and education programs we are constantly seeking new ways of attracting and engaging visitors. This will continue as we reinvent the house museum experience through developing new interpretations, including those that reflect our Indigenous heritage. Our collections will be carefully curated and the stories behind them will be brought to life using technology and digital media.

As a strategic priority, we will seek to attract larger and more diverse audiences, captivating them through revealing stories and memorable experiences. This will require increased consultation and engagement with communities, subject experts and cultural specialists to ensure our narratives and interpretations are meaningful, engaging and rigorous. Growing our partnerships with local communities, cultural institutions, artists and performers will complement and make more memorable the visitor experience.

GOAL 2.1:

VISITOR EXPERIENCES

Attract more visitors to our heritage sites with engaging storytelling and innovative visitor experiences.

GOAL 2.2:

COLLECTIONS

Increase access to collections with the use of technology and promotion.

GOAL 2.3:

EXHIBITIONS

Develop new audiences through our major exhibition program.

GOAL 2.4:

EDUCATION

Improve understanding and engagement with Victoria's heritage through innovative and dynamic education programs.

GOAL 2.5:

TECHNOLOGY

Increase community engagement with Victoria's heritage through revitalised and innovative use of technology.



Puttin' on the Ritz Soirée
at Rippon Lea



3 Building Strong and Enduring Relationships

We will work collaboratively with key stakeholders and partners to build a shared understanding of the value of our heritage, and increase our capacity to protect and celebrate Victoria's heritage.

Building strong and enduring relationships requires commitment by all parties and the National Trust will be proactive, innovative, trustworthy and dedicated partners.

The National Trust's purpose is to protect, conserve and share Victoria's heritage. We engage with many committed stakeholders including our members, local communities, Government, corporations and philanthropists. Our stakeholders are pivotal to our success and we deeply value their support and contributions.

As a strategic priority, through a shared understanding of the value of Victoria's heritage, we will improve engagement with our key stakeholders and the wider community. We will seek stakeholder opinions, feedback and ideas. We will build strong relationships that encourage and enable active participation. Through these relationships, we will establish our collective expertise and resources to ensure positive heritage outcomes for Victoria.

GOAL 3.1:

HERITAGE VALUE

Ensure the value of Victoria's heritage is shared, understood and appreciated by our key stakeholders and the wider community.

GOAL 3.2:

MEMBERSHIP ENGAGEMENT

Double the membership base and improve the level of interaction and services.

GOAL 3.3:

COMMUNITY ENGAGEMENT

Increase the active participation of communities in the life of the National Trust.

GOAL 3.4:

GOVERNMENT ENGAGEMENT

Increase proactive Government engagement to achieve positive long-term benefits for Victoria's heritage.

GOAL 3.5:

CORPORATE ENGAGEMENT

Engage corporates to contribute in meaningful ways to support our vision and strategic objectives.

GOAL 3.6:

PHILANTHROPIC ENGAGEMENT

Increase annually the numbers of philanthropists committed and gifting to our cause.

GOAL 3.7:

BRAND AND REPUTATION

Build the National Trust's brand to help people understand our purpose.

GOAL 3.8:

EXTERNAL HERITAGE FUNDS AND APPEALS

Raise awareness of the National Trust's role as an effective administrator of external heritage funds and appeals assisting the community to conserve and restore their buildings.

4 Innovative Custodian of Heritage

We will be trusted leaders in the conservation, protection and activation of heritage properties, places and collections.

Over the coming years, we will showcase prioritised sites that have been sensitively restored and innovatively activated.

Victoria has a recognisably diverse and rich cultural heritage. As custodians of various properties and collections, we are responsible for protecting our cultural heritage for future generations. This requires long term investment in conservation and maintenance. As an **innovative custodian of heritage** we continually identify new ways of using and activating our properties to enhance community knowledge and involvement and to generate sustainable income to support conservation and maintenance.

As a strategic priority, an analysis of each site will be undertaken to identify major capital, conservation and maintenance requirements. We will prioritise properties by significance, condition, opportunity and risk. This will lead to the development of a 10-year Asset Management Plan and supporting Annual Maintenance Plans and Schedules for every property.

GOAL 4.1:

FUTURE PROOF OUR PROPERTIES

Purposefully activate our properties in sustainable ways for today and future generations.

GOAL 4.2:

CONSERVATION

Conserve our heritage properties in an environmentally and financially sustainable manner.

GOAL 4.3:

ASSET MAINTENANCE

Plan and schedule preventative maintenance to prolong the useful life of our heritage assets.

GOAL 4.4:

COLLECTIONS MANAGEMENT

Improve the management, preservation and use of collections.

GOAL 4.5:

NATURAL AND CULTURAL LANDSCAPES

Protect, restore and promote sustainable use of our natural and cultural landscapes.

GOAL 4.6:

BUILDING PARTNERSHIPS

Develop mutually beneficial partnerships with key stakeholders to drive positive heritage outcomes for Victoria.

GOAL 4.7:

CONSERVATION AND HERITAGE LEADERSHIP

Showcase to the community and industry excellence in conservation, heritage management and adaptive re-use of properties.



Elizabeth Anya-Petrivna with some of the Trust's costume collection



Rippon Lea gardeners

5 Investing in Our People

We will invest in our people to grow our culture of positivity, engagement, passion, expertise, and accountability, providing a great place to work and volunteer.

There are many people who contribute to the life of the National Trust including, Branch committees, expert committees, volunteers and staff. Our people are located throughout Victoria; in Melbourne, the greater metropolitan area, to regional centres and sites. By **investing in our people**, we increase our levels of engagement and job satisfaction. Improving our productivity and enhancing benefits for our members, visitors and benefactors. Our focus on learning and development opportunities will continue as we support our people to clearly understand the National Trust's future and the importance of their contribution.

As a strategic priority, by focusing on our culture, we will build strong working relationships reflective of our values. We will build high performing teams, increase communication, review our systems and adopt new technologies for greatest impact. Our culture of continuous improvement and learning will underpin all that we do.

GOAL 5.1:

CULTURE

Ensure the National Trust is a "great place" to work and volunteer.

GOAL 5.2:

RECRUITMENT AND RETENTION

Attract highly motivated, experienced and skilled individuals through effective recruitment and retention practices.

GOAL 5.3:

PERFORMANCE MANAGEMENT AND DEVELOPMENT

Develop our people in response to both organisational and individual needs with a clear focus on delivering our collective and individual goals.

GOAL 5.4:

VOLUNTEERS

Attract and support volunteers to participate in meaningful and rewarding opportunities at the National Trust.

GOAL 5.5:

BRANCH COMMITTEES

Improve formal structures and support mechanisms to assist Branch engagement and capacity to contribute to our wider organisational goals.

GOAL 5.6:

WORKPLACE SAFETY

Ensure a safe place for our people to work and volunteer.

GOAL 5.7:

RISK MANAGEMENT

Protect the interests of our people, visitors and benefactors through responsible risk management.

GOAL 5.8:

HUMAN RESOURCE SYSTEMS AND REPORTING

Improve workforce management and measurement of organisational and individual performance through establishment of human resource systems.

GOAL 5.9:

GOVERNANCE

Ensure the National Trust is effectively managed and legal responsibilities are upheld through effective leadership and governance capability.

6 Building Financial Strength

We will diversify and grow revenue through activities and engagement with, and secure funding from, philanthropic partners, Government, corporates and other sources.

As a not for profit organisation, we need to generate sufficient revenue to sustain our day-to-day operations, capital requirements and other financial obligations. Our revenue streams are generated from membership fees, commercial activities, donations, sponsorships and grants. Since our inception in 1956, we have been supported by our members, private donors, corporations and Government. We see this support continuing as we strengthen those relationships and invite new supporters to join us.

As a strategic priority, we will **build our financial strength** by growing our commercial activities and sustainable operations. We will improve financial outcomes through diversifying our revenue streams. We will invest in technology, marketing and staff to achieve our strategic objectives.

GOAL 6.1:

COMMERCIAL OPERATING ACTIVITIES

Deliver sustainable revenue streams through commercial activities to fund our operating costs.

GOAL 6.2:

NEW INCOME GENERATION

Diversify income streams to protect the National Trust from being dependent on one major source and build our financial strength.

GOAL 6.3:

FUNDRAISING

Increased focus on fundraising activities in order to support our strategic objectives.

GOAL 6.4:

NATIONAL TRUST OF VICTORIA FOUNDATION

Build contributions to the NTVF to ensure long-term financial sustainability.

GOAL 6.5:

PROCUREMENT AND CONTRACTS

Integrate purchasing and contracting arrangements to reduce costs and improve supplier performance.

GOAL 6.6:

BUILDING CAPACITY

Invest in technology, marketing and staff to build the internal capacity required to bring the Strategic Plan to fruition.



Endeavour Fern Gully



Vision for our centenary

By 2056, the centenary of our founding, the National Trust will have assisted Victoria to become renowned as a world leader in heritage protection. Preservation of Victoria's heritage will be universally acknowledged as the vital link to our cultural, educational, aesthetic, inspirational and economic legacies - all of the things that quite literally make us who we are.

CONTACT US

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We acknowledge the Traditional Owners of Country throughout Victoria and recognise the continuing connection to lands, waters and communities. We pay respect to Aboriginal and Torres Strait Islander cultures; and to Elders past, present and future.

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Front cover : Barwon Park by Chris Groenhout