



National Trust of Australia (ACT)

Strategic Plan – 2019 to 2024

Original Approved by Council: 17 April 2019.

Includes 2020 Amendments Approved by Council: 7 May 2020

Introduction and Document Purpose

Prior to this document, the National Trust of Australia (ACT), ACN 008 531 182, (hereinafter 'the Trust') last prepared a complete strategic plan in 2010. Since that time, the Trust has undergone significant change, particularly as the nature of grant funding has diminished and the Trust has had to adapt to those changes.

Notwithstanding these changes, the Trust maintains a number of core values. These include:

- committing to heritage conservation, education, celebration and promotion, and defending of a sense of place in a changing world
- enabling the diverse range of members, supporters, staff and the community at large to participate and collaborate in the Trust's activities and business, encouraging debate, and valuing their participation and opinion
- working in a collegial fashion with like-minded organisations locally, nationally and internationally, to contribute to heritage policy development
- demonstrating integrity and ethics through the highest standards of governance.

The core legal document for the Trust is its constitution. This Strategic Plan outlines the purpose and vision of the Trust, supports the constitution, and outlines a plan of activities for forthcoming years to support this vision. The strategic plan will be supported by an annual business plan, which highlights specific objectives and deliverables each year. The annual business plan must be in alignment with the strategic plan. Consequently, the strategic plan may be updated over its lifetime with minor amendments, if necessary.

While this document was originally published by Council in April 2019, it was amended, reapproved, and republished by Council in 2020. This document is now known as the 2019-2024 Strategic Plan.

All previous strategic and business plans will be superseded by this 2019–2024 Strategic plan and the annual business plan.

Organisational Purpose

The purpose of the Trust is:

To promote the conservation of, and foster public knowledge about, places, objects and issues that are significant to the heritage of the Australian Capital Territory.

Vision

The vision of the Trust is:

To be an independent and expert community advocate for conservation of our cultural, natural and Aboriginal heritage, based on a committed and active membership and a strong financial base.

Strategic Context and Proposed Outcomes

The Trust operates in a challenging operating environment. Some of the major factors which influence the Trust are as follows:

- The Trust maintains a relationship with National Trusts of Australia – which gives members reciprocal access to National Trust properties worldwide, and a licence to use the National Trust logo.
- The Trust maintains a high per capita membership, however relies on a core group of active members and volunteers. A growing and more active membership, supporting the purpose and goals of the Trust, is desired.
- The Trust runs a highly successful tours and events programme for the benefit of members and supporters.
- The Trust has historically received grant revenue to support its operations. Declines in revenue, particularly from a reduction in government grants over recent years have challenged the Trust, which needs to find alternative ways to secure revenue and maintain and improve its financial position. Innovative ways will be needed considering the nature of the Canberra market, organisations with similar purposes, potential indifference to heritage issues, and the demographics of members and supporters.
- The Trust has opportunities to use its trusted brand to promote the activities of the Trust and raise its profile. Sponsorships, fees for service, assuming responsibility for further heritage assets, and a contemporary media profile (including use of social media) are all areas for exploration.

Goals / Objectives

The goals of the Trust are:

1. To promote heritage conservation, education and celebration in the ACT and nationally. Focus areas may include:
 - a. maintaining an independent voice on heritage issues within Canberra and the surrounding region
 - b. a more contemporary approach to communicating the Trust's activities with the public, including updates to social media and the website in particular
 - c. using the brand of the National Trust to support its values, purpose and vision.
2. To engage and value our membership. Focus areas may include:
 - a. better communicating our activities and encouraging the participation of members in those activities
 - b. continuing to provide interesting tours and events for members to participate in
 - c. broadening our appeal to members and increasing our membership numbers.
3. To encourage members, staff and volunteers to participate and build capacity in our business and activities. Focus areas may include:
 - a. engaging with stakeholders, politicians, and like-minded associations to build our capacity
 - b. professionalising our organisation through employing staff and maintaining a vibrant office
 - c. strengthen and adapt our governance to the needs of our organisation.
4. To be financially sustainable. Focus areas may include:

- a. continuing to encourage sponsors and donors to support the activities of the Trust, and managing any potential conflicts of interest
- b. pursuing grants when suitable
- c. offering additional products and services to grow the Trust.

A Multi-Year Plan

The Trust has a multi-year plan to change from its current, mainly volunteer driven approach, to a more professional organisation. However, the highly successful tours and events, and heritage and advocacy work continue through the life of this plan.

The major elements of this plan are:

1. a contemporary strategic plan, reviewed and adjusted if necessary each year, supported by an annual business plan
2. a stronger balance sheet, with increases in revenue through a diversity of sources
3. a professional image of the Trust, assisted by employed staff
4. a vibrant office used by staff, members, and the public.

Elements 1 and 2 incorporate the 'Stabilise' phase of the plan. These initiatives commence immediately and are refined through the lifetime of this strategic plan.

Element 3 consists of the 'Build' phase of the plan. Depending on any budget constraints, the Trust will look to commence employing professionals to manage aspects of the Trust's activities. It is estimated that this stage will commence after the Trust's finances have stabilised and its balance sheet shows signs of growth. This phase will continue for the rest of the plan.

Element 4 consists of the 'Professionalise' phase of the plan. Again, depending on budget constraints, the Trust should establish its own heritage office, a vibrant place for members, staff and the public to gather, support and advocate the Trust's purpose.

Measures

Measures, aligned to the goals, will change over the life of the strategic plan as the plan is implemented. Consequently, the detailed measures for each year of the strategic plan will be contained in each year's business plan.

The initial release of this Strategic Plan in 2019 had the Stabilise Phase in 2019 and 2020, with the Build Phase through 2021 and 2022, and the Professionalise Phase from 2023 and beyond. Council determined during the 2020 financial year that while the Trust's finances did show signs of stabilisation, they had not stabilised to the point that allowed the Trust to move to the next phase. This was further exacerbated by the impact of the COVID-19 Coronavirus pandemic during 2020. Consequently, Council agreed in 2020 to adjust the timing of the measures to extend the Stabilise phase by one year, and subsequently delay the implementation of further phases by a year.

An indicative list of measures for each phase, with the amended timing, of the plan are as follows.

Stabilise – 2019 to 2021	Build – 2022 and 2023	Professionalise – 2024 and beyond
1.a. New communications plan b. Mobilising community support around a concept of heritage values for the ACT 2. a. Broaden membership appeal b. Survey, review and action members' needs 3. New strategic plan, new annual business plans 4. Stabilise and grow the balance sheet	1. Mobilising community support around a concept of heritage values for the ACT 2. Increase member satisfaction 3. a. Annual business plans, strategy update b. Consider employing professional staff 4. Grow the balance sheet	1. a. Mobilising community support around a concept of heritage values for the ACT. b. A new heritage office. 2. Increase member satisfaction 3. a. New strategic plan b. Manage staff in line with budget capability 4. Grow the balance sheet

The Annual Report of the Trust will contain details on how the Trust is progressing in achieving the measures.

Implementation

Governance

The Trust's peak governing body is the Council, which is elected annually. The Council maintains ownership of the strategic and business plans, and reviews and approves them annually.

Supporting the council are three committees:

- Heritage committee: which manages the Trust's core functions of advocating for heritage issues within the community;
- Tours and Events committee: which manages the highly successful, and profitable, tours events and talks programme for the year. The tours and events programme is one of the major ways in which members participate directly in the activities of the Trust.
- Business Development committee: which examines the business strategy of the Trust, its opportunities to develop revenue for the Trust, and formulates the strategic and business plans for approval by the Council.

Membership of committees is determined by the Council, however members are invited to participate. Other committees may be established for other, specific purposes.

Members and volunteers are encouraged to participate in the Trust's activities.

Annual schedule

The Trust operates on a financial balance date of 30 June each year, and prepares an Annual Report for the prior year to be tabled at the Annual General Meeting held each October. The following planning timelines are used to support these outcomes:

- May and June: Annual business plan for the forthcoming year is developed;
- July to September: Measures for prior year are reviewed, and the annual report developed;
- October to April: Review and monitor annual business plan for success against measures.

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Purpose

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Vision

To be an independent and expert community advocate for conservation of our cultural and natural and Aboriginal heritage, based on a committed and active membership and a strong financial base.

Goals

1. To promote heritage conservation, education and celebration in the ACT and nationally
2. To engage and value our membership
3. To encourage members, staff and volunteers to participate and build capacity in our businesses and activities
4. To be financially sustainable

Stabilise – 2019 to 2021

Build – 2022 & 2023

Professionalise – 2024 & beyond



Indicative Measures*

1. a. New communications plan
b. Mobilising community support around a concept of heritage values for the ACT
2. a. Broaden membership appeal
b. Survey, review and action members' needs
3. New strategic plan, new annual business plans
4. Stabilise and grow the balance sheet

Indicative Measures*

1. Mobilising community support around a concept of heritage values for the ACT
2. Increase member satisfaction
3. a. Annual business plans, strategy update
b. Consider employing professional staff
4. Grow the balance sheet

Indicative Measures*

1. a. Mobilising community support around a concept of heritage values for the ACT
b. A new heritage office
2. Increase member satisfaction
3. a. New strategic plan
b. Manage staff in line with budget capability
4. Grow the balance sheet

*The business plan for each year will contain more up to date and specific measures

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