



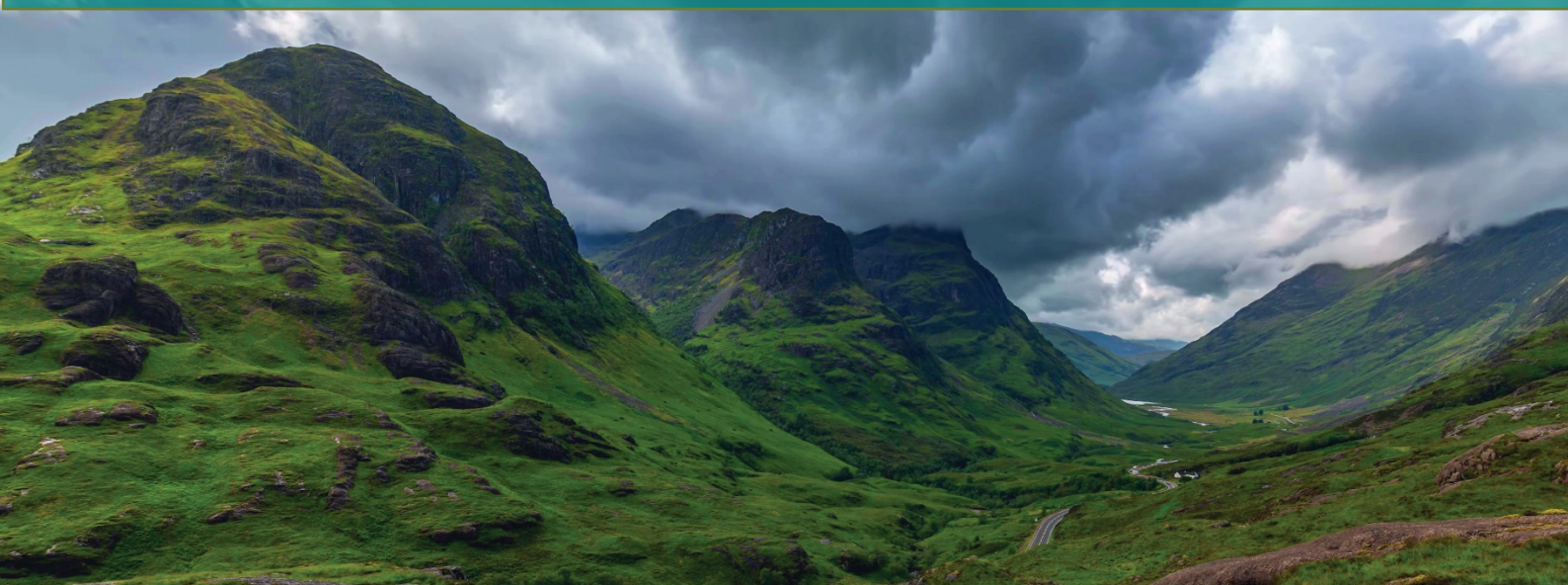
# Appointment brief



**NATIONAL  
TRUST *for*  
SCOTLAND**

# Appointment of Director of Heritage Properties

October 2021



# An introduction

## About the National Trust for Scotland

Established as an independent charity in 1931, the Trust's core purpose is the promotion of the conservation, access, and enjoyment of Scotland's places of historic interest and natural beauty. The Trust is Scotland's largest independent conservation charity, owning and with the responsibility to care for a large portion Scotland's most significant heritage, from coastlines to castles, art to architecture, gardens to wilderness.

With a presence across the country, from Shetland in the north to Dumfries and Galloway in the south, and from Aberdeenshire in the east to the island archipelago of St Kilda in the west, the Trust's responsibilities include –

- 271 listed buildings
- 11 castles, including a Royal palace
- Coastlines, which along with 400 islands and inlets, provide habitats for over one million seabirds
- Natural and designed landscapes and all the wildlife they support
- 187,000 acres of countryside
- 46 of Scotland's Munros
- 245 miles of mountain footpaths
- 11,000 archaeological sites
- 28 major gardens caring for over 100,000 exotic plants, plus native flora
- 8 National Nature Reserves
- 45 sites of Special Scientific Interest
- Britain's only UNESCO recognised dual world heritage site at St Kilda
- Battlefields and Birthplaces, including Culloden and the birthplace of Robert Burns
- Over 300,000 artefacts and objects of art and design

Together these places tell many of the stories of Scotland and Scots in the world.

The National Trust for Scotland is the largest member organisation in Scotland, supported by more than 320,000 Members. Access and enjoyment is fundamental to the Trust's charitable purpose, and over the years of its existence it has welcomed many millions to its places. In 2019 (prior to the pandemic) over 4 million visited and approximately 150,000 people experienced the Trust's formal and informal learning programmes.

The pandemic has provided many challenges for the Trust, but because of the generosity received in support of its cause and the actions the organisation has taken, the charity has demonstrated its resilience and is now planning optimistically for its future. The majority of its properties reopened early in 2021, and work was restarted on many of its conservation projects. Notable has been the reopening of the House of Dun, providing expanded displays of historic objects from the Trust's collections and new experiences for its visitors, the restoration and reopening of Gladstone's Land on Edinburgh's Royal Mile, and the provision of new visitor facilities at Newhailes House. A new garden design was completed at Pitmedden in Aberdeenshire, and further plans were put in place to ensure the biodiversity of the Mar Lodge Estate and restore historic structures there.

These are examples of only some of the ongoing work that takes place across the Trust's estate, which also includes building conservation and restoration, archaeological investigations, restoration of mountain footpaths, removal of invasive species, care of gardens and collections and much more. The Trust is a multi-faceted and complex organisation which cares for an extensive portfolio of properties and which speaks up for the protection of Scotland's wider heritage (human-made and natural). Its responsibilities lie across all of Scotland and it delivers charitable purposes to a wide range of audiences, the diversity of which it wishes



## Strategy

A new strategy is currently being developed to enable the Trust to deliver its charitable purpose; this will be launched in 2022. The strategy will set out the Trust's ambitions for the next ten years, guiding the charity through a period of recovery towards its centenary in 2031 and ensuring the organisation works towards leaving a further legacy for the century ahead.

At the heart of our strategy is the recognition that the Trust is a charity with a compelling and enduring cause. People will always want to learn about the past, visit new places, immerse themselves in nature and beauty and enjoy time and inspirational experiences with family and friends, all of which is at the heart of the Trust's business.

Our new strategy is being designed to enable us, in the first instance, to recover from the impacts of the global pandemic and address the conservation needs at our properties. It will have many ambitions beyond this, which will require our organisation to adapt and grow if it is to address wider challenges such as climate change and an uncertain social and political decade ahead. Throughout the last eighteen months however, the vital place the Trust has in people's and communities' lives has become all the clearer - in caring for our shared heritage, contributing to well-being and addressing pressing environmental concerns. These themes will be important to our new strategic direction, as well as addressing our fundamental purpose of conservation of and access to Scotland's heritage.

## Finance Management

The Trust's total annual income is c£60million, with net assets (excluding the heritage estate) of c£240 million. A large proportion of its annual operating expenditure and income generation happens through the Heritage Operations Directorate. The Chief Executive is responsible to the Board of Trustees for the fulfilment and control of the Trust's approved budgets, working closely with the Chief Operating Officer in this and with the wider leadership team, now to include the Director of Heritage Properties.

## The opportunity

In 2020 a new phase of leadership at the Trust began with the appointment of Philip Long as Chief Executive and then subsequently, Katerina Brown, the Trust's Chief Operating Officer. Together with the Trust's Leadership Team, comprising leads from across the Trust's responsibilities, the charity has taken significant steps in recovering from the pandemic, attending to the needs of its workforce (employee and voluntary), developing a new strategy, and addressing its processes and planning, all with the intention of ensuring a sustainable organisation for the future.

At the heart of the Leadership Team's work, and the work of all staff, is ensuring the Trust's fundamental purpose as a conservation charity that is vital now and relevant to the future. The Trust is an independent charity, and so its sustainability is dependent on earnings generated by its properties, membership subscriptions, philanthropic support, commercial activities, and invested income.

Critical to its future success will therefore be the continuing development of awareness of the Trust as a compelling charitable cause and a fundraising and income-generating body, one that is recognised for its longstanding care of Scotland's heritage and providing access and inspiring experiences for its audiences.



*"These places and objects tell the stories of Scotland and Scots in the world; how people travelled and interacted across the wider world, taking with them their energy and values and returning with new ideas."*

# The role

## PURPOSE OF POST

Under the Trust's new leadership, the role of **Director of Heritage Properties** has now been created. The role will be vital to the realisation of the Trust's work and its strategic vision, and so is an exciting one of great opportunity to contribute at the highest level to the future care of Scotland's outstanding heritage.

Reporting to the Chief Executive, the role will be a member of the Trust's leadership team. This is a substantial management position, responsible for the oversight and support of teams operating within the visited heritage estate, and the direct line management of the Trust's four regional managers as well as the manager of the distinct Mar Lodge Estate. Thus, the post holder will be responsible for the overall operational management of all Trust properties, leading and supporting the regional managers, and ensuring liaison with all other departments within the organisation to achieve this. The heritage estate includes visited properties, non-visited properties, and a further portfolio of properties not owned by the Trust, but with which it has conservation agreements.

Fundamental will be ensuring the appropriate ongoing conservation and care of properties and the collections they contain (reflecting the purpose and high standards of Scotland's leading conservation charity), as well as the development of those properties and their interpretation, working closely with colleagues across the organisation to provide inspiring visitor experiences which understand audience needs and the visitor journey.

Within the overall timescale of the new strategy, it is intended that considerable investment will be made across Trust properties, and so the post holder will have a substantial responsibility to work with colleagues in developing appropriate visions, and planning, implementing, and evaluating the success of transformational capital projects.

The Trust's properties are at the heart of generating income for the Trust's operation, and so this will be a vital responsibility of the post holder, leading commercial initiatives and working with colleagues to encourage growth in Membership, commercial income generation (in particular through retail, food and beverage, and events), and opportunities for philanthropy.

Access for audiences is vital to the Trust's purpose, and so an audience-focused approach demonstrating an understanding of the Trust's audiences, working to retain existing ones and diversify these will be an essential consideration in all aspects of the post holder's work.

The directorate of Heritage Properties has the largest staffing complement within the Trust, comprising employees and a very substantial workforce of volunteers. The Director of Heritage Properties will also work with colleagues within the directorate and elsewhere in the Trust in support of the Trust's numerous Members' Centres, which support the organisation through fundraising activities and in other voluntary ways. Thus, the successful candidate will bring substantial experience in managing heritage properties at scale with the ability to manage a dispersed staff across the whole of Scotland, who contribute to the Trust through a very wide range of roles. In addition to strong strategic, operational, and planning skills, critical will be the post holder's ability to lead, motivate and inspire people.

This will be a highly visible leadership role within and without the Trust. Thus, the successful candidate will possess strong stakeholder management skills, working with multiple national and local agencies across Scotland and with local communities to promote the interests of the Trust and to market its places and activities.

## MANAGEMENT STRUCTURE

The National Trust for Scotland's operational management is provided by the Leadership Team.

This comprises the Chief Executive, the Chief Operating Officer, the Director of Customer & Cause, the new role of Director of Heritage Properties, the People Director, the Head of Conservation & Policy, the Head of Heritage & Consultancy Services, four General Managers covering the Trust's operational regions and the Operating Manager of the Mar Lodge Estate.

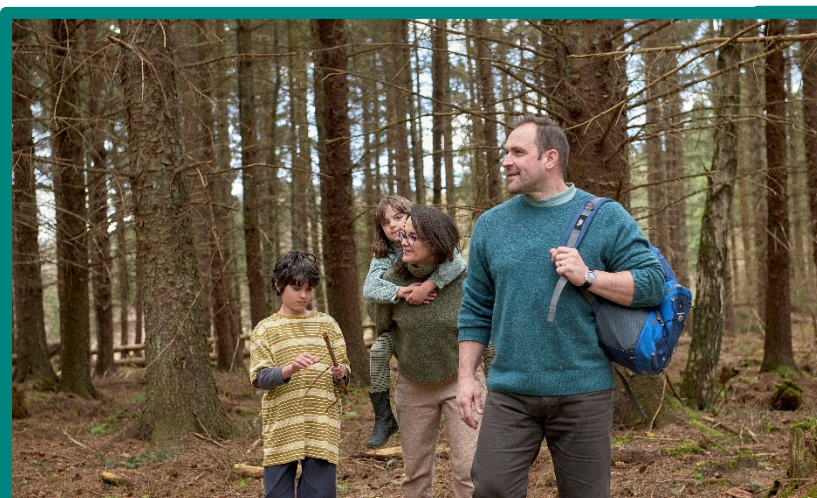
The role of Director of Heritage Properties will be directly responsible for the four regional General Managers and the Operating Manager of the Mar Lodge Estate. All other roles in the Leadership Team report directly to the Chief Executive. The Role of Director of Heritage Properties will be fully supported by an Executive Personal Assistant.

## LOCATION

While it is envisaged that the role would be based at the Trust's headquarters in Edinburgh, it will be an essential requirement to travel frequently and spend time at Trust locations, working with colleagues across Scotland. The Trust is currently developing a New Ways of Working strategy, which is intended to provide new ways of smart working, including remotely, from home and from Trust properties.

## KEY RESPONSIBILITIES

- To provide leadership, support and direction for the operation, care, development, and future vision of the Trust's heritage estate.
- To play a key role in the Trust's overall leadership, contributing to its direction for the future and helping to embed the new strategy across the organisation, and in particular the Heritage operations directorate.
- To contribute to the Trust's long-term financial stability and organisational resilience.
- To recognise and manage strategic risks facing the organisation and implement strategies to reduce the impact of risk.
- To communicate in a clear and inspiring fashion the vision of the Trust and in particular the work and ambitions of the directorate of Heritage Properties, both within and without the organisation.
- To ensure that colleagues responsible for are accountable for the delivery of high levels of performance, from idea generation through to execution, by setting clear and achievable standards, plans, targets, and methods of evaluation.
- To continue to improve the organisational abilities of the Trust, in visitor service, conservation and maintenance care, cross-functional team working, problem solving and relationship management.
- To play a key role in the development of the organisation as a fundraising one and one which contributes more widely to Scotland, in particular at property level encouraging practical and financial support of the Trust's work and promoting the Trust's work more widely.



# Person specification

## Qualifications, skills, experience and knowledge

- Proven success at senior management level in a medium to large-sized organisation responsible for heritage and/or the natural environment and for public access to that.
- A track record in delivering transformational capital projects that inspire interest and demonstrate the overall values and ambitions of the organisation.
- Experience of and ability to promote strong cultural values within an organisation and success in inspiring, bringing together - and motivating a workforce.
- The ability to identify strengths and challenges in teams and supporting development through training and other means.
- The ability to undertake complex exercises in planning and budget setting that balance the needs of the organisation, and which are deliverable.
- Strong commercial awareness, entrepreneurial flair, and excellent financial management.
- A demonstrable interest in (and preferably recognised expertise in one aspect of) the conservation, access and enjoyment of heritage.
- Strong representational and media skills, and the ability to build awareness of the Trust, its work and properties.





# Terms of appointment

<b>Role Title:</b>	Director of Heritage Properties
<b>Department:</b>	Leadership Team
<b>Reports to:</b>	Chief Executive Officer
<b>Pay Grade &amp; Salary:</b>	Please contact Saxton Bampfylde for details
<b>Type of Contract:</b>	40hrs per week
<b>Normal place of work:</b>	Edinburgh (notionally) <sup>1</sup> with flexibility for some home working
<b>Driving licence for UK driving required?</b>	Yes – on occasion, attends meetings in locations away from normal place of work, many of which are not readily accessible by public transport

## How to apply

Saxton Bampfylde Ltd is acting as an employment agency advisor to **The National Trust for Scotland** on this appointment.

Candidates should apply for this role through our website at [www.saxbam.com/appointments](http://www.saxbam.com/appointments) using code **CNSM**.

Click on the 'apply' button and follow the instructions to upload a CV and cover letter, and complete the online equal opportunities monitoring\* form.

The closing date for applications is noon on **18<sup>th</sup> November 2021**.

\* The equal opportunities monitoring online form will not be shared with anyone involved in assessing your application. Please complete as part of the application process.

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<sup>1</sup> Will be asked to work-from-home whilst ongoing COVID-19 well-being measures are in place in the Trust in 2021

# Saxton Bampfylde

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