Strategic Plan 2020-2025

Vision and Mission

NAT believes that historic sites are important not only for their intrinsic merits but because they are enlivening, life enhancing places that can give people a sense of identity, wonder, enjoyment and personal enrichment. In other words, historic places are about people as much as about the bricks, stones and flint in the earth. This is why NAT's mission is about:

Protecting Norfolk's history for people to enjoy everyday

The word history is carefully chosen because it embraces the whole span of human activity from pre-history to the present: places that exist under the ground and above the ground, places that have tangible and intangible meaning. Most of NAT's activity can be technically described as archaeology but can be more popularly defined as history – the study and appreciation of people in the past and the remains they have left for us today.

NAT has adopted a succinct statement that describes its business model – the means by which it will help to protect the county's history for people to enjoy. This is:

Working with local communities to save Norfolk's irreplaceable historic sites and to share them with everyone.

Together these two statements underpin NAT's forward vision and 2020-2025 Strategy.

These are big ambitions and, in order to narrow down how exactly NAT will achieve them it is necessary to set some long term goals, a more focussed identification of what NAT wishes to achieve in practice over the next decade. The goals are the high-level aspirational part of the strategy. These will not fundamentally change over the period of the strategic plan, although it might be necessary to tweak the language in order to clarify or modify them according to external environment.

In order to achieve the goals NAT will need to undertake certain activities. These are the strategic objectives. For each goal there are no more than three or four of these. The wording of the objectives is more precise and measurable. In order for staff and council to assess progress in meeting the objectives, and therefore moving towards the goals, there are a small number of performance indicators linked to the objectives. These form part of the business plan and can be monitored quarterly by Council, and more often by staff.

Reports produced during the Onwards and Upwards project have fed into this strategy and these provide more detail and reasoning behind several of the strategic objectives.

The NAT Business Plan 2020-2025 is an operational document that puts budgets to the objectives in the strategy. It is intended that it should be read in conjunction with this strategy.

The five strategic goals are as follows:

1. Focus resources on rescuing Norfolk's most At Risk heritage, and promote the skills to do so

2. Involve and inspire a greater number, and a wider range, of people and deepen their participation and support

3. Develop dynamic and mutually beneficial relationships with organisations that will help deliver NAT's purpose

4. Raise awareness of NAT and its essential role in protecting Norfolk's heritage

5. Develop a sustainable business model through greater entrepreneurship, improved financial management, and rejuvenated governance

3. Strategic Goals

Strategic Goal 1, NAT will:
Focus resources on rescuing Norfolk's most At Risk heritage, and promote the skills to do so

3.1   Central to NAT's operating model has always been the acquisition of important sites at risk in Norfolk. Indeed, the rescue of threatened sites and their subsequent care and interpretation is the principal motivation for people to support NAT and believe in its existence. For the continued future health of NAT it needs to be seen to be an active participant in Norfolk's heritage and proactive in identifying and contributing to the rescue of important places. Just managing the existing portfolio, as important as that is, will not increase public support and involvement, win financial donations, and motivate members and trustees to become more deeply involved in caring for Norfolk's heritage through NAT.

3.2   Although NAT needs to be a louder voice in the heritage landscape of the county its unique offer is its ability to rescue, conserve and share heritage At Risk. There are many who campaign, many who advocate, but few others in Norfolk, if any, who actively rescue and retain sites for public benefit. NAT has been very successful at this in the past but has not taken on any new responsibilities since 2012.

3.3   NAT last updated its acquisitions policy in April 2017 and set out five tests that had to be passed before acquisition be considered:

1. Being a Scheduled Ancient Monument

2. Considered 'Heritage at Risk' by Historic England

3. Being accessible to the public and potential ownership by NAT increasing public benefit

4. Funding to include capital and revenue

5. Availability of staff capacity

3.4   These five tests will continue to underpin the NAT's approach to acquisition. In addition to fulfilling its core purpose acquisition can do much to re-energise and re-vitalise NAT. Acquisition can be the engine for change and renewal and a rallying cry for attracting a wide spectrum of support. Therefore, targeted acquisitions that meet all of NAT's criteria, are a central part of the strategy over the next decade. Well-chosen strategic acquisitions will:

- Raise NAT's profile
- Attract volunteers including new Council members
- Attract new donors
- Strengthen key relationships with statutory bodies and funders
- Provide a staffed visitor attraction

- Generate modest but reliable income

- Provide an identifiable centre for NAT

Objective 1:1. NAT will work more closely with Historic England, local authorities, private owners and funding bodies in finding solutions to removing archaeological sites from the national At Risk Register.

3.5   NAT is in a unique position in Norfolk. It was set up to acquire, conserve and present to the public important historic sites in the county. As such it has an important role to play in the conversation about Norfolk's Heritage At Risk. In the future it will work more collaboratively with local and national bodies with an interest and expertise in identifying At Risk sites to find long term solutions for them.

Objective 1:2 NAT will take on a new rescue and acquisition project in order to save it for posterity and to re-energise and re-vitalise NAT and its supporter base

3.6   Returning to NAT's core mission is not only a duty on the trustees to fulfil their charitable objects, it is a business strategy that will help rejuvenate NAT's role in Norfolk's heritage and enable it to prosper. The right new project will be a call to arms, an opportunity to communicate NAT's mission, skills and values, and a chance to improve its long term sustainability.

Objective 1:3 NAT will use its role in acquisition projects to promote an interest and enthusiasm for conservation, for public education and information and the development of specialist skills in Norfolk.

3.7   A new acquisition project will not only save outstanding threatened heritage and contribute to the re-energisation of NAT it will also provide an opportunity to inspire and enthuse people with the processes of conservation and restoration through providing public access and events. It can be a powerful tool for education at all levels from schools to universities as students have the opportunity to learn about and research Norfolk's history and archaeology. Specialist skills in the county can be nurtured and advertised through working on the project securing the conservation workforce of the future.

Strategic Goal 2, NAT will:
Involve and inspire a greater number, and a wider range, of people and deepen their participation and support

3.8   It is not currently known how many visitors come to see NAT sites each year. An automatic counter at St. Benet's Abbey suggests that it alone attracts over 30,000; the total across all sites must be at least three times that. Over the autumn of 2018 visitor research to inform this strategy was undertaken at St Benet's Abbey, Caistor Roman Town and at Burgh Castle.

3.9   Feedback from the surveys and focus groups undertaken as part of Onwards and Upwards reveals that visitors were struck by the peacefulness and uniqueness of the sites and regular visitors were happy with the status quo despite, or perhaps even because of, the lack of facilities. Satisfaction amongst tourists may be lower, although static interpretation at the sites is modern and well presented.

3.10   For a small organisation NAT has been very successful in engaging people in events and activities at its sites over the last few years. Many of the projects have been funded by the National Lottery Heritage Fund. Projects initiated and organised by NAT are paralleled by others generated by friends' groups at NAT sites such as St. Benet's Abbey and Caistor Roman Town. This plan sees both types of engagement as being central to NAT's strategy to widen participation and engagement. The *Audience Development Plan* contains specific projects that NAT can deliver over the next three years.

3.11   While NAT's own projects can be simply and clearly delivered as part of its strategy, those run by The Caistor Roman Project and by the Friends of St. Benet's Abbey have the potential to confuse people as the role of NAT. Working closely with these independent groups for mutual benefit is an important strategic objective for the future.

Objective 2:1 Devise, negotiate and launch a new membership/friends' scheme that embraces existing site-based friends' groups and NAT membership in order to encourage engagement and communication.

3.12   NAT currently runs its own membership scheme with around 80 members who pay £15 a year. For this members receive monthly email Newsletters, an illustrated Annual Report and an invitation to the AGM. As well as these people who identify with NAT there are two other strong site-based supporter groups: The Caistor Roman Project who have some 300 people on their mailing list and 70 paying members. They are amongst the most engaged supporters of NAT. The Friends of St Benets have 60 members who pay £5 each a year and who have been successful in raising money for on-site events.

3.13   The aim of the new scheme is to create a virtual and physical community of people passionate about NAT and its sites to act as a forum for communication and a vehicle for encouraging deeper participation. The new scheme will resolve the issues around the existing membership schemes into an umbrella scheme and seek to attract new members (see Appendix 2 *Fundraising Strategy*).

Objective 2:2 Deliver a public events, education and activities programme based on the *Audience Development Plan* (Appendix 2).

3.14   Firstly, the plan will concentrate on improving visitor data and understanding existing audiences while trialling various new types of events. Secondly, the plan will build on the visitor data and experience of events in support of applications for funding to the Arts Council and others to fund events that target specific audiences. This will be followed by a review of the success or otherwise of the programme and allow the construction of a longer-term forward plan. Ideally NAT will have a project in progress to establish a learning centre associated with a new acquisition.

Objective 2.3 Recruit a volunteer co-ordinator to recruit, engage and motivate volunteers to share in achieving NAT's goals

3.15   Increasing the number of volunteers working with NAT is a key objective. It increases NAT's capacity to achieve its goals and crucially relieves the pressure on its director, allowing her to work at the strategic, outward-facing level. To

properly benefit from the power of volunteers, and to relieve the director from the necessity to manage them, it will be necessary to secure funding to employ a volunteer co-ordinator.

3.16 A separate *Volunteer Strategy* sets out how the co-ordinator can work closely with the established friends groups, existing volunteers and with potential new recruits in all aspects of NAT's work.

Strategic Goal 3, NAT will:
Develop dynamic and mutually beneficial relationships with organisations that will help deliver NAT's purpose

3.17 NAT is a well-established body on the county heritage scene but it could be much more dynamically networked with organisations that share similar aims and ambitions both locally and nationally. These relationships may yield financial support, opportunities for cost savings, joint research projects, ideas for new initiatives, examples of good practice and chances to recruit volunteers, members or trustees. Awareness of NAT and its activities will be spread more systematically through such networks raising its profile and its efficacy. In four areas NAT will be more proactive in establishing and nurturing its networks. These are institutional funders, historic environment bodies, natural environment organisations and tourism bodies.

Objective 3.1 Invest more resources in establishing long term financial support from trusts, foundations, the lottery funds, local and national government.

3.18 Building relationships with charitable trusts is a core part of this strategy. NAT will seek to build relationships with major trusts who fund capital development, events, education, research and some digital projects. There are also local and county-wide trusts which can support NAT.

3.19 NAT already has a very good relationship with the National Lottery Heritage Fund and the NHMF and will continue to invest in these relationships. The Arts Council, Postcode Lottery and other national funds will be a focus of new relationship-building.

3.20   NAT will continue to engage with DEFRA and its agencies as they are NAT's largest and most important funder,

3.21   Historic England is a key stakeholder with whom NAT has shared site-ownership and an important role in Heritage at Risk, this relationship will continue to be vital to NAT's future.

Objective 3.2 Develop stronger working relationships with local stakeholders concerned with heritage conservation in Norfolk.

3.22   For NAT to play a more effective and dynamic role in protecting and managing historic sites in Norfolk it will need to form closer working relationships with national, county-wide and local organisations who are engaged in similar heritage activities. Strengthening its network will bring NAT opportunities for research collaboration, new streams of funding, cost savings, profile-raising, joint-working and recruitment.

3.23   The aim is to develop memoranda of understanding with the most important organisations such as the Norfolk and Norwich Archaeological Society which has very similar objectives and some 450 members. NAT will participate more actively with other county bodies such as the Norfolk Federation of Archaeological and Historical Societies and The Norfolk Archaeological & Historical Research Group.

3.24   Nationally NAT will seek to gain greater benefits from an association with bodies such as the Association of Preservation Trusts, the Heritage Alliance, the Architectural Heritage Fund and other bodies from which NAT can learn and benefit.

Objective 3.3 Highlight the significance of the Natural Environment in NAT's care in order to increase people's enjoyment of them and secure financial support

3.25   Many of NAT's sites are noted for their natural as well as their built heritage. Although none are nationally designated for their natural conservation status the estate contains local designations as County Wildlife Sites and significant species. This, and the inherent natural beauty of most of the sites, are an important reason for many to visit and enjoy

them. Over the next five years the natural environment will become a more important part of the marketing and promotion of NAT sites.

3.26   Not only this but current and future agri-environment support will be based around increasing biodiversity across all agricultural holdings, therefore increasing biodiversity will be a key aspiration for NAT. An important objective is to manage NAT sites in such a way so as to not only secure their heritage value but to increase and enhance biodiversity.

3.27   Some local conservation organisations are already involved in managing some NAT sites and it is proposed to investigate the possibility of more formal arrangements with organisations such as Norfolk Wildlife Trust. Joint promotion of NAT sites will be explored.

Objective 3.4 Engage more fully and actively with local and county-wide tourism bodies to build profile and income generation of NAT sites.

3.28   NAT will be more focussed in using free and paid for events advertising through the local Destination Management Organisations (Visit Norfolk and Visit East of England). It will put greater emphasis in engaging in regional, national and international initiatives such as Norfolk Day, National Coastal Tourism Academy, Heritage Open Day and Visit England, linked to the Audience Development Plan. NAT will continue to develop relationships with the New Anglia LEP and other relevant LEPs. Closer links with other historic environment and nature visitor attractions will ensure NAT leaflets are available at regional National Trust and similar attractions.

Strategic Goal 4, NAT will:
Raise awareness of NAT and its essential role in protecting Norfolk's heritage

3.29   Awareness of NAT and the role it plays in Norfolk's history and archaeology is low. Even regular visitors to NAT sites have a poor awareness and understanding of NAT. The low profile of NAT inhibits its ability to garner support, enrol volunteers, win funding and play a full role in the county's heritage. Key to this strategy is raising the profile of NAT across the board over the next five years. An important element in this will be returning to the core role of saving threatened heritage, but this needs to be backed up by a structured approach to brand, marketing and advocacy.

Objective 4.1 Roll out the new NAT brand across all sites, in print and digitally

3.30   NAT has a strong new brand identity backed-up with a new website. The next step is to apply this to all communication channels. NAT will roll-out new signage at all its sites including way-finding, improved interpretation, a fundraising ask and car parking charges where appropriate. A new suite of corporate and marketing materials will be designed, produced and disseminated. Used consistently it will help differentiate NAT from other heritage organisations, increase visibility and recognition.

Objective 4.2 Implement the marketing strategy

3.31   The marketing strategy sets out a framework that will guide marketing but allows flexibility for activities to be scaled up or back depending on resources available in the future. Its implementation will build awareness of and interest in NAT, its purpose and sites, engaging existing and new audiences and stakeholders. It will expand the credibility and reputation of NAT, supporting fundraising and income-generating activities.

3.32   In a crowded and competitive landscape of heritage organisations within Norfolk, clarity, consistency and repetition in NAT's marketing will be key to standing out and getting heard. The creation and sharing of a marketing toolkit to anyone involved in NAT's marketing will help ensure consistency across marketing channels and NAT's sites.

3.33 A set of identified priority marketing activities that do not require any budget will ensure that NAT can start to build its presence in the interim period, before more marketing resources are available.

Objective 4.3 Articulate the mission and identity of NAT more effectively and persuasively

3.34 NAT has, in its director an articulate persuasive advocate for its work. NAT Council members have a very good range of skills and experience and new members have recently been recruited to strengthen and broaden those skills. NAT will need to develop a succession plan for Council members and Chairman, and recruit a patron, who can support and complement the director's skills in promoting the NAT's mission. NAT will develop a structured programme of communication to build an understanding of NAT and its goals. This programme will support efforts at fundraising and commercial income growth as well as the acquisition and conservation of new sites.

Strategic Goal 5, NAT will:
Develop a sustainable business model through greater entrepreneurship, improved financial management, and rejuvenated governance

3.35 A separate *Income Generation Opportunities paper* analyses in detail the opportunities for generating greater income from the existing portfolio of sites and makes suggestions as to how this could happen. It also suggests that the right new acquisition could make a positive financial contribution to NAT's overheads. Combined with a more structured and dynamic fundraising programme, with carefully identified calls to action, this will help secure NAT's long-term financial future.

3.36 Although in financial terms the additional sums required to secure NAT's long-term future are relatively small, securing income streams will also require the efficient deployment of existing resources and the help and support of well-qualified and committed trustees and volunteers.

Objective 5.1 Develop the commercial potential of current NAT sites

3.37   NAT's sites will never generate a vast commercial surplus, but they can make a very worthwhile contribution to their costs and to NAT's overheads. Four areas of commercial activity have been identified for development over the next five years. Voluntary charges for car-parking will be introduced at two sites – Caistor and Burgh, with opportunities for regular users to join NAT and park free. This will require a technological solution to fee collection and some site monitoring. Carefully targeted retail and food and beverage concessions at the most popular sites - Burgh, Caistor and St Benet's, will be negotiated. A programme of charged-for events will be launched in conjunction with third parties at first, but towards the end of the plan period by NAT itself. In all, these activities have the potential to generate perhaps £15,000 pa after three years operation. To avoid controversy this low-level commercialisation requires careful handling and close integration into the marketing and communication strategies.

3.38   Opportunities for generating increased income from farming (outside agri-environment grants) is limited. NAT has around 117 hectares of grazed or managed grassland. Grazing, which is in keeping with the traditional nature of NAT's sites will remain the principal form of grassland management. However, the diverse range of sites and short-term nature of many of the current arrangements is time consuming and inefficient to manage. Over the plan period efficiencies will be made through standard agreements, longer licences and leases and a reduction in the number of contractors.

Objective 5.2 Deliver the Fundraising Strategy/Plan

3.39   NAT is currently not exploiting opportunities to fundraise from its existing visitors, or actively cultivating future supporters. A separate *Fundraising Strategy* outlines several practical actions that NAT should deliver in the short-term to increase fundraising income. A regular giving option is now available on the new website. Other suggestions include: increasing micro-donations from onsite visitors by increasing visibility of fundraising messages and improving mechanisms to give (such as contactless donation points) across its most popular sites, and restructuring the Friends'/Membership schemes, referenced above, to include a higher-level Patron's scheme to encourage larger gifts and legacies.

Objective 5.3 Secure a new historic site which can act as a centre, provide a venue for events and generate an income over and above its costs.

3.40   NAT is hampered by having no centre or visible base and no site where there are profitable commercial activities. The acquisition of such a site would create a foundation from which NAT could build a much more powerful presence. It would demonstrate NAT's capability and weight as well as delivering a low-level income to help defray core running costs. A key priority for NAT over the next five years will be to secure such a site.

Objective 5.4 Secure efficiencies in operation that contribute to the long-term sustainability of NAT and its sites.

3.41   NAT will explore links with similar and sister organisations with a view to sharing costs and therefore reducing outgoings. Work will continue to streamline current operations through negotiated management agreements and contracts reducing input from the director. Commercial links will be investigated in the latter stages of the plan as a way of reducing costs further.

Objective 5.5 Refresh the NAT council with trustees who can help deliver the five year strategy and recruit volunteers to support them in this task.

3.42   A separate review of NAT's governance recommends that, in light of its new five-year strategy it reviews the skills required on the Council and develop a succession plan which continues to recruit new trustees who can support the director in achieving the goals.

4. Delivering the Strategy: Risk, Timetable and Resources

Embarking on any new strategy involves the acceptance and management of new risks. It is the responsibility of NAT's Council to own the risk register and monitor it. Risk should be regularly reviewed and monitored. The following risk register relates specifically to the principal risks in the Strategic Plan. It may not be the same as the risks that face NAT as a whole. These would include, for instance, health and safety at the sites. The risks in the plan can be condensed and rationalised and added to the NAT Risk Register.

4.1 NAT Strategic Plan Risks

No.	Risk	Risk Ranking Product (P) = Likelihood (L) x Impact (I)(ranked 1-3)			Controls to manage risk and effectiveness of controls	Status (with controls in place) Green: robust Amber: effective in part Red: requires attention
		L	I	P		
1	Agri environment grants not renewed	1	3	3	Very little that NAT can do to influence national policy. Ensuring that Nat continues to be in close touch with its contacts in DEFRA making the case for its own position.	🔴
2	Car Parking Charges cause a storm	2	2	4	Prepare a careful marketing and launch plan setting the charges in the context of NAT's new strategy. Consult with local groups. Give advance warning.	🟡
3	Friends groups do not wish to affiliate with NAT scheme	2	2	4	Refine and develop arguments for the benefits of the scheme and work closely with local groups to develop it.	🟡
4	Impossible to find suitable rescue site	1	2	2	Work closely with Historic England and the County Council to identify sites.	🟢
5	Failure to raise grant for volunteer coordinator	2	2	4	Ensure all grant avenues local and national investigated. Develop effective advocacy for the role and for NAT.	🟡
6	Fundraising lacklustre and ineffective	3	2	6	Ensure call to arms powerful. Develop effective advocacy for NAT and its mission	🟡
7	Inability to recruit suitable new members of Council	1	3	3	Ensure NAT's mission and aims are engaging persuasive, articulated clearly. Be clear about skills requirements.	🟡