

AGM report 2020: Caroline Davison, Director

I'm going to talk briefly about the annual report and then go on to talk in a bit more depth about what our plans are in the coming months and years, based on our strategic and business plans.

As everyone knows, this last year has been dominated by the impacts of coronavirus. Many of the events and activities we had planned, as a start to implementing our strategy have been knocked off course and we are still assessing how this will affect what we do in the forthcoming year. For example, we were a fair way along in putting together an application for a lottery-funded project at Caistor which had the potential for some exciting archaeological investigation at the Roman Town in partnership with Caistor Roman Project – something I hope we can return to soon, once the National Lottery Heritage Fund is open to new applications. We will also investigate other ways of delivering this.

But I am eternal optimist, and there have been some positive things to note. As I've written in the newsletter, NAT was relatively insulated against the impacts that other heritage organisations suffered such as museums and historic houses who rely on visitor income. In fact we had an increase in visitors and an uplift in on-site donations.

Another positive thing is we now have a volunteer co-ordinator – Natalie – who has been able to provide support for our volunteers even though many of their usual activities had to be stopped. The HODs on-line events were a triumph in terms of widening our engagement: 13 videos uploaded on *facebook* and 10 Where Am I? posts, viewed by 14,200 people, this included 10,680 who did not already follow NAT. There were 1,175 engagements (likes and comments) *Twitter* had 5,496 impressions from the Where Am I? posts with 469 engagements

We should also be proud of facilitating the Almanac project at Burgh Castle which has had such positive benefits for its participants, especially during the lock-down period, and will provide a model for other organisations to use who work with people with mental health issues.

Production of the new guide book at Caistor was also a welcome event, and they've been selling like hot cakes. The guide book brings together all the research from the past 14 years and sets out how our understanding of the site has been completely transformed.

It's been a year of personnel changes. Natasha Hutcheson moved on, Maureen Kimbley retired, and Peter Griffiths stepped down as chair, after nine very successful years as trustee and chairman. Jonathan Sisson, who became trustee in 2019 has taken up the role. We have welcomed on board 4 other new Trustees who have brought new skills and experience in archaeology, project management, finance, land management and the law – all very relevant to our future plans.

We've also been joined by Natalie, and by Helen Evans who has taken up the new role of Administrator.

Despite unexpected challenges, there is much to be positive about! With this in mind, I'm going to move on now to the strategic and business plans. So I'm going to talk briefly about the context for each of our 5 new strategic aims



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

As always, NAT's prime concern is to rescue significant archaeological sites that are at risk. It has been asked by a member why we haven't taken on any new sites in the last few years so I want to explain the context for this.

NAT Council is continuously looking for 'at risk' sites that would benefit from our management. But when we do this we also have to take into account the existing ten sites we look after, and our commitment to their ongoing upkeep.

As set out in our acquisition policy, we can't afford to take on sites that do not have some sort of endowment or other structured funding package to cover long-term maintenance costs, otherwise we risk putting the continued maintenance of our existing sites at risk. Currently, our annual income only just covers our costs – bear in mind that we manage and maintain all these 10 sites on around £88,000 a year.

And just a quick further point on maintenance. Although the Trust has been very successful in bidding for capital grants to conserve sites when we acquire them, the work doesn't stop there. Flint ruins weather constantly and are also vulnerable to damage from visitors and livestock. Funding is required on a regular basis to carry out remedial programmes of work.

Over the past three years council members have investigated seriously the possibility of taking on two significant sites at risk in the county but they were not satisfied in the end that either site would be able to produce enough income to afford their maintenance without impacting existing sites.

But we *are* currently exploring the potential for acquiring another significant site which looks more hopeful and we hope to be able to release more information about this in the coming months. We are confident that if successfully acquired, the site would provide exactly the kind of project that would also achieve the second part of this strategic aim - to promote an interest and enthusiasm for conservation, for public education and information and the development of specialist skills in Norfolk.



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

The objects set out in the Trust's memorandum of Association are to 'promote and foster the discovery, excavation, preservation, recording and study of sites and objects of archaeological and/or historical importance within the county of Norfolk *for the public benefit.*'

Public benefit is at the heart of our work, and the memorandum goes on to speak of creating 'places of resort for purposes of recreation and instruction' to produce published material such as magazines or books, promote and disseminate research, and take steps to procure donations and subscriptions to support our work. The Trust has never been just about acquiring and preserving sites – it established the aspiration right at the start to engage people in the sites and garner their support. Though drawn up in 1923 – almost 100 years ago - these activities remain entirely relevant.

At the moment the Trust has about 80 members, and your annual contribution towards our work is an important part of our income. Obviously we would like more!

We also have a growing number of committed volunteers (circa 80) who provide guided tours, support school visits and carry out site wardening. Interestingly, these two groups do not overlap significantly.

Then we have our visitors. We know now that we have well over 30k visitors at St Benet's every year, and over 40k at Caistor. Preliminary surveys at Burgh indicate that 40k is a likely figure there as well. This is a large number of people who benefit from our work. We need to find ways of engaging effectively with all these groups in a sustained way to encourage support of our work through membership, volunteering and through donations and sponsorship.

If we don't involve and inspire people, we can't expect to garner support. So under this aim we intend to put into place a new supporter scheme which embraces all our interest groups – members, volunteers, visitors – and builds a more joined-up NAT community. This is something we'll be developing over the coming months, as well as looking at ways we can reach out to visitors through public events which - depending on COVID - may well be virtual to begin with but will offer interesting ways for people to find out about us and our work.





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



NAT already works well with funding bodies and local stakeholders. In the past 10 years we have accessed over one-and-three-quarter million pounds in grants towards 10 projects and we will continue to foster these relationships – in particular, we will need to engage with the new farm payments scheme which will be administered through the Rural Payment Agency – more of that later.

And we are currently working closely with Historic England in discussions on that possible acquisition I mentioned earlier. We are also always seeking to collaborate and partner with local stakeholders.

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



The research done through the recent Onwards and Upwards project identified very clearly that NAT's profile is very low – many visitors to our sites didn't know we owned them or didn't know who we were or what our role is. We've already done a lot of work to address this – our new website and branding is much more user friendly, and instantly recognisable, and all sites now have branded welcome signs with standard information about our role, our need for public support and H&S information.

We have also engaged with social media – twitter facebook and now Instagram. As I've already mentioned, the effectiveness of using digital tools was recently demonstrated when volunteers helped us to produce online content for the Heritage Open Days events.

We don't just do this for the fun of it! People have to know we exist before they can support us, and so we have to use all the channels we can to catch people's attention. We will be doing more work in the future to track the impacts of this kind of work and to identify what works the best in terms of reaching new audiences and translating this into support.



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

Now we come to the business plan and why we need one.

In the past the Trust was able to rely on farming payments that came via the EU – the Basic Payment Scheme - which paid all farmers a basic payment per hectare ; and a series of agri-environmental schemes - such as Higher-level stewardship and now Countryside Stewardship. We receive these at five of our sites and in the past the payments have been able to guarantee a substantial set income for 10 years at a time which helped to subsidise the costs of sites where we had no significant income- such as at St Benet’s Abbey.

This is no longer the case. The current Countryside Stewardship Schemes only extend to 5 years and the payment levels are lower. For example, at Burgh Castle we used to receive just over £6k a year under HLS. Under CSS we receive less than £3k – but we still need to pay the caretaker the same level to maintain the site.

As Brexit kicks in we will be entering from 2024 a new phase of payments under the banner of Environmental Land Management (ELMS) - which will support ‘public money for public goods’ - that is environmentally sustainable farming and forestry practices. In principle NAT should be well-positioned to take up these schemes and will be keen to do so under the category of ‘beauty, heritage and engagement’ - for example, through implementation of measures to support biodiversity at our sites and through our public access arrangements.

But we currently have no idea of the level of payments, although most commentators think that it will in no way replace the old level of payments. And before ELMS start in 2024 we will face a year by year reduction in Basic Payments which is being phased out. Next year it will be reduced by 5% but we have not been told what the scale of reductions will be in the following years.

I’ve described this in some detail as I want to set the context for why we have developed NAT’s first Business Plan. Basically we need to be more imaginative and flexible about producing streams of revenue that are not reliant on government funding schemes that are liable to change.

The purpose of the Business Plan is to generate revenue which can both secure the maintenance and conservation of our existing sites and provide the flexibility we need to be able to take on new sites.



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

A key part of the plan is to acquire a significant site which will provide a 'call to arms' – an opportunity to inspire and enthuse people, as well as acting as a centre and a venue for events.

During the Onwards and Upwards project our project management team, along with our consultants, and the regional officer from Historic England visited 8 sites currently on their 'at risk' register. Only one site offered the possibility of fulfilling both the call to arms and the potential of acting as a 'centre' – a kind of HQ for NAT – but after extensive research and discussions with the current owners Council came to the conclusion that it would not be a viable project.

So we are now investigating the possibility of acquiring a site that will be a profile raiser for the Trust and a 'call to arms'; and looking at a separate site for developing an 'HQ' where we can hold meetings and events, provide shelter for volunteers and visiting groups and so on. Obviously I would love to provide more details about all this but at the moment while we're still researching and negotiating and consulting, it isn't quite the time.

We also plan to raise more revenue at our sites. As set out in the strategy this will include developing a new supporter scheme, including a Patrons scheme, and running fundraising events. We also have information on our website now on how supporters can remember us in their will – and I hope members will consider this seriously.

We will also be looking to raise money from our car parks. We realise that for frequent visitors to our sites who are used to parking for free, this might be annoying, but the fact is, it's very rare for land-owning charities, such as the National Trust and English Heritage, not to charge for car parking - it's one of the few streams of revenue that can be generated at unstaffed sites. And again, we're only contemplating this because we need to secure more revenue to support our work. If each of the 40,000 visitors to Caistor paid us £1 per visit our fortunes could be transformed! A sub-committee has been looking into the various alternatives for charging and we will be consulting with local communities before we take any plans forward. If we do go ahead, members will be offered discounted deals.

Although the matter of ensuring future funding for our work is a serious business, I think the Trust is actually on the threshold of a very positive new phase. Current council members are really engaged in taking these initiatives forward, and my feeling is that by the time of its centenary year in 2023 the Trust will be in a much better position to last another 100!

