

FROM START- UP *to* SUSTAINABILITY

AN INTO
HANDBOOK
FOR HERITAGE
TRUSTS



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We hope the Handbook will be a resource for INTO members and all those who are devoted to conserving heritage.

Dr June Taboroff and Catherine Leonard

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“The National Trusts of the world share a remarkably simple mission: to help people to value and protect their natural and built heritage. The family of Trusts includes established organisations which have been practising heritage conservation for many years as well as new and developing Trusts.”

*/ HRH The Prince of Wales
International Conference of National
Trusts, Cambridge 2015*

TABLE OF CONTENTS

Preface

- I Introducing INTO and Background to the Handbook (p 4)*
- II Heritage Trusts: Why and What (p 7)*
- III Starting a Heritage Trust (p 15)*
- IV Encouraging Public Engagement and Participation (p 31)*
- V Promoting Resilience and Sustainability (p 47)*
- VI Conclusions and Looking Forward (p 59)*

Annexes

References



PREFACE

DAME FIONA REYNOLDS
CHAIRMAN, INTO

The International National Trusts Organisation (INTO) is the umbrella body for the global family of National Trusts and similar organisations. They come together to share ideas, resources and experiences, to grow the capacity of existing trusts and establish new ones in countries where they do not currently exist, and to act as a global voice on international heritage matters.

Our mission is to ‘promote the conservation and enhancement of the heritage of all nations for the benefit of the people of the world and future generations’. When I became Chairman in September 2015, I set out three key strategies for achieving this:

- 1. Family:** Supporting our members in the achievement of their goals by providing opportunities to collaborate and share ideas, resources, skills and knowledge;
- 2. Growth:** Building global capacity for heritage conservation by nurturing National Trusts (new and existing) and growing the movement; and
- 3. Voice:** Speaking out with authority and purpose on global conservation issues critical to INTO’s membership; celebrating what is unique and special about the National Trust approach; and supporting our members with their influencing campaigns.

Today there are heritage trusts in countries and territories ranging from Australia, Bermuda and China all the way through the alphabet to Trinidad and Tobago, Yangon City and Zimbabwe. We now have over 70 member organisations.

The very recent establishment of National Trusts in the Czech Republic and Georgia, and discussions about similar processes in Malaysia, Slovenia, Thailand and Uganda show that the National Trust approach, built on community engagement and sustainability, is viewed by many as an important model.

The experiences of our members are invaluable and significant material has been generated over the years. The 2002 document Heritage Trusts: Creating Opportunities for Public Participation in Cultural Conservation, prepared for the InterAmerican Development Bank has served as a benchmark for organisations wishing to form a trust.¹

//Image: L’Albergo Diurno Metropolitano, Fondo Ambiente Italiano (FAI), Venice, Italy

¹ <https://intoorg.org/wp-content/uploads/2016/01/June-Taboroff-NT-Establishment-doc.doc>

“National trusts were, and continue to be, established to preserve historic places and places of natural beauty for ever and for everyone. When heritage sites and open spaces are threatened by indiscriminate development, national trusts are founded to restore special places, protect them, and ensure public access.”

/ Fiona Reynolds, INTO Chairman

In a changing world we have seen the retrenchment of government support for heritage in many countries and the growth of civil society organisations working in the heritage field. The need for a reference manual bringing together the experience of INTO member trusts is now paramount.

So ten years since the establishment of INTO, and fifteen since the 2002 Manual, we are delighted to have worked with the Daniel K. Thorne Foundation and Cultural Resource Specialist, Dr June Taboroff on this exciting new resource.

The idea of the Handbook is to showcase the work, philosophy and organisational structures of National Trusts around the world. It is intended as a resource both to people and groups thinking of establishing a National Trust and for existing trusts to be inspired by the experience and activities of other INTO members. It will demonstrate why trusts matter and what they can achieve in all parts of the world.

The process for collecting and researching content has been a collaborative one with INTO members contributing case studies and references, and selecting topics to be covered. It is envisaged that the Handbook will be a significant contribution to strengthening the whole INTO community – old and new, big and small – as we strive to support the global heritage movement.



INTRODUCING INTO AND THE BACKGROUND TO THE HANDBOOK

CHAPTER ONE

INTO IS A WORLDWIDE NETWORK OF HERITAGE TRUSTS DEDICATED TO ENGAGING THE PUBLIC WITH A DEEPER APPRECIATION AND UNDERSTANDING OF THE PAST AND INSPIRING ACTION TO SHAPE A HEALTHY AND EQUITABLE FUTURE.

A common thread among INTO members large and small is a conviction that heritage and its conservation matter. INTO is the only organisation that represents the interests of the National Trust movement at the international level.

INTO provides members with access to expert advice on such topics as site management and public engagement programmes; organises learning exchanges ranging from one-to-one collaborations to webinars and international conferences; and carries out advocacy. The Secretariat writes policy and briefing papers, supports and advises heritage trusts, runs the INTO website and social media, sets up conferences, meets politicians and policy-makers, and creates relationships with like-minded campaigners. It creates the tools to make the case for heritage trusts.

INTO includes more than 70 members in 56 countries. It has encouraged the formation of regional networks as a way for members to address common contemporary issues. The current Regional Groups are:

- Caribbean Conference of National Trusts
- INTO Africa, and
- Asia Heritage Network.

We also work closely with Europa Nostra. Behind these regional groupings are the local networks of heritage conservation groups that collaborate to find solutions to pressing threats.

Although INTO is a young organisation, it has high aspirations to be:

- A convenor to bring people and organisations together to share expertise, experience and resources;
- A platform to take issues of global concern to world fora and governments; and
- A voice to help inform agendas of the heritage sector and its stakeholders.

The National Trust Movement

The National Trust family is part of a global conservation movement that unites people in their concern for the world's heritage. It cares about special places, as defined by their communities, protecting them for ever and for everyone. National – or simply heritage – trusts are about connecting people to their heritage. They are about involving communities in their past – and their present – through caring for and about those places.

Since its creation in 2007, INTO has furthered this movement across the globe, creating an international forum and working together to generate a new dialogue with decision makers and with each other. As the leading authority on the work of trusts worldwide and the focal point for the global movement, INTO is often called upon for advice on all aspects of setting up and running a National Trust.

The Handbook

In keeping with INTO's emphasis on reciprocal learning and exchange of ideas and best practice, the Handbook is a collaborative effort that draws on the work of the members. The Handbook takes stock of recent developments among its members and the National Trust movement, reflecting the geographical and cultural diversity of current practice in its in-depth exploration of the challenges, successes and best practices. It builds on the 2002 InterAmerican Development Bank handbook on heritage trusts.

INTO members have noted that many of the available resources on heritage trusts were limited to European, North American or Australian contexts. The Handbook enlarges the perspective although it does not claim to offer answers to all questions raised by the practice of heritage conservation.

By calling on the work of INTO members and others, it provides innovative and inspirational examples of how to deal with the many challenges posed by contemporary environmental, social and economic factors. These examples and the explanatory text highlight the relevance of heritage in the 21st century – in post-conflict countries, small island nations and elsewhere – and ways in which societies can move forward together.

This Handbook aims to give readers tools so that their organisations are equipped with the resources needed to make their work relevant and to maintain the highest standards of care.

There is no 'one size fits all' approach. By drawing on the diversity of INTO members' administrative structures, work and the contexts within which they operate, the Handbook intends to give a systematic overview of civil society led conservation, share lessons learned, and work towards guidelines for best practice by pointing to creative ways to address some of the common challenges. The basic guidance that is provided will be adapted according to different contexts and needs.

A word on terminology. Although many of the INTO member organisations are national in scope (and name), there are others that are regional or city level in their geographical remit. For this reason we refer to *heritage trusts* in the Handbook. We speak interchangeably about public engagement and civic engagement (civic defined as 'relating to the duties or activities of people in relation to their town, city or local area').



HERITAGE TRUSTS: WHY AND WHAT

CHAPTER TWO

THIS CHAPTER INTRODUCES THE CENTRAL CONCEPTS AND RATIONALE UNDERPINNING HERITAGE TRUSTS AND DISCUSSES THEIR PURPOSE AND FUNCTIONS.

While heritage trusts come in many shapes and sizes, there are some core characteristics. Among their defining features are:

- Classification as a charity, non-profit organisation or foundation
- Community based
- Broad constituency or membership
- Site management or stewardship function
- Education and advocacy role
- Civic engagement
- In many cases, independence from government control

The ‘Why’ of Heritage Trusts

The earliest National Trusts were founded on the simple and enduring idea that people need historic, beautiful and natural places which provide relaxation, perspective, escape, and a sense of identity. This idea is no less true a hundred and twenty years later in an era in which an increasing proportion of people live in large urban centres – over 54 percent of humanity (UN Habitat, World Cities Report, 2016) – and public funding is often much reduced.

All societies are faced with change, sometimes at a seemingly breakneck speed. Heritage trusts can play an important role in:

- Constructing a sense of meaning of the past and how that past is related to the present and passed on to the next generation;
- Collectively sharing a cultural knowledge base;
- Bringing people together; and
- Empowering society to take action to conserve their heritage.

Groups come to the formation of a heritage trust in different ways: some were already involved in promoting conservation of the living and built environment while for others issues of national

identity began to emerge in the aftermath of conflict. For some the disruptive impact of mass tourism or the destruction of cherished landmarks has been a call to action.

Urgent Causes

There is a sense of urgency that motivates post conflict societies or those living in places subject to high development pressure as they define their relationship to the past. Their voices can be powerful as in the case of Sierra Leone, Trinidad and Tobago and Malta. Not all crises, however, result in the creation of a viable organisation.

Sierra Leone: Heritage in a Post Conflict Society

Sierra Leone is a country with enormous survival needs, making heritage conservation and cultural rights rank low in government's priority scale. These have been the universal challenges in the field of heritage conservation in the country resulting in neglect of heritage assets over the years... (This is) coupled with under-resourcing since the Commission is primarily dependent on government subvention to dispense its public duty namely restoration, preservation and promotion of Sierra Leone's cultural heritage. One specific issue is to influence government to the realisation of culture in national development. The Commission recognises that the neglect of culture in Sierra Leone threatens to undermine and corrode the very process of the country's development.

/ Monuments and Relics Commission of Sierra Leone

Destruction of Landmarks and the Birth of Heritage Trusts

In 1985 following the public outcry over the intended demolition of the George Brown House in Port of Spain, Trinidad, concerned individuals formed the 'Citizens for Conservation' which became the vanguard and voice for the protection of the natural and built heritage. In 1991 the National Trust Act of Trinidad and Tobago came into effect followed by the establishment of the Trust in 1999, with which Citizens for Conservation continues to work in collaboration.

Whereas in other Caribbean islands the preservation of natural and cultural heritage resources has been closely linked to economic development, particularly tourism, this has played something of a back seat in Trinidad and Tobago where energy and oil finds have driven the economy.

The establishment of the National Trust showed the willingness of Government to explore innovative approaches to using heritage assets and alternative models of conservation. Yet with only a limited legal framework for built heritage conservation, competing demands for funding and strong market pressure for redevelopment, it has taken some time for the Trust to take root.

In recent years public concern for heritage conservation has increased alongside the growth of enthusiastic and knowledgeable civil society organisations and a developing donation, volunteering and membership culture.

While still mainly funded by government, the Trust is growing its outreach and education work, and participating in conservation projects that will provide models for the future. It is also encouraging public discussion about conservation issues in Trinidad and Tobago and what role heritage plays in the quality of the built environment.

/ National Trust of Trinidad and Tobago



// Image: Officials from the National Trust stop [temporarily] the demolition of Grefriars Church on Frederick Street Port of Spain (photo by Robert Taylor)

Hong Kong's Examination of a New Heritage Trust

The Government of Hong Kong commissioned a feasibility study for the creation of an independent heritage trust in 2012-13. The study reviewed heritage management and conservation challenges in Hong Kong, the government role in the heritage sector and that of civil society and academic organisations, and gaps in functions.²

On the basis of an analysis of remit, responsibilities, and resources of a new trust, the study examined the institutional and financial requirements thereof and alternative forms of a heritage trust. It asked key questions: why is a trust needed, what might a trust do, does it need to be a statutory body, can popular support be mobilised, and is a membership based heritage organisation possible?

It proposed the structure of the new trust, with suggestions for staffing. It also analysed start-up and operational costs and options for ongoing financial support. It recommended an organisational framework including board and governance structure and provided outline Terms of Reference for the key positions.

As part of the feasibility study a number of stakeholder consultations were held, with relevant Government agencies, NGOs, academic bodies, and community leaders.

Changes in political leadership have left this project in abeyance.

Inclusion

It is important to recognise instances where heritage does not seem to bring people together. Conflict is often rooted in competing claims to the past and heritage sites can be powerful symbols and consequently key targets, serving to inflict emotional and psychological wounds on the 'other' and gain the attention of the international community. There are many negative examples, some extreme as the Chinese Cultural Revolution or ISIS in Syria and Iraq and others more subtle.

In Suriname, agreement on heritage matters among ethnic communities – Creole, Maroons, Hindustanis, Javanese, etc. – is yet to be forged. Each group has its own attitude towards the colonial architectural heritage and levels of involvement in heritage vary from group to group (according to a questionnaire).

Government cultural policies seem to have two objectives which may be at odds: preserving cultural diversity and creating a national identity. The Dutch use the term 'mutual heritage' to describe the Dutch overseas heritage in their former colonies. This concept may be aspirational in many multi-ethnic post-colonial societies.³

Several heritage trusts have explicitly addressed issues surrounding inclusion, among them Heritage New Zealand, the National Trust of Canada, and the Australia National Trusts. The National Trust England, Wales and Northern Ireland has recently established a Lesbian Gay Bisexual and Trans and Queer (LGBTQ) programme⁴ while the U.S. National Trust for Historic Preservation has an established Diversity Program.⁵

Inclusion takes on further importance in the light of respect for human rights, namely the observance of cultural practices.

² <https://intoorg.org/wp-content/uploads/2017/07/Hong-Kong-Report.pdf>

³ <https://intoorg.org/wp-content/uploads/2017/07/Mutuality-of-Colonial-Heritage-in-Multiethnic-Paramaribo.pdf>

⁴ <https://www.nationaltrust.org.uk/features/exploring-lgbtq-history-at-national-trust-places>

⁵ <https://intoorg.org/knowledge-base/inclusive-organization>

Heritage New Zealand: Fostering Inclusion

Fostering an inclusive New Zealand identity is a priority for Heritage New Zealand. This involves supporting Maori cultural aspirations and meeting the needs of Maori in a culturally sensitive way. The Maori Heritage Council is charged with promoting 'tapuwae' or sacred footprint. Maori consider support and assistance in conservation of their heritage places and buildings as a feature of cultural redress.

Recognising places that contribute to New Zealand's culture and telling their stories are a means to achieve this aim. Historic New Zealand is also strengthening the ways it works and communicates with indigenous populations and its relationships with communities and volunteers. The organisation is preparing a comprehensive stakeholder engagement strategy.

Building public support for heritage by working together with the community, property owners and other heritage organisations also involves working with iwi to conserve Maori heritage.

With the 2014 passing by Parliament of the Heritage New Zealand Pouhere Taonga Act, the idea of a shared past has gained impetus.

Heritage New Zealand considers inclusion as integral to identity, sense of place, and nation building. It is hoped that the sense of isolation of Maori heritage as a side line of the nation's life will be replaced with an understanding of the value of Maori heritage to all New Zealanders.

/ Heritage New Zealand⁶

The 'What' of Heritage Trusts

Heritage trusts come in many versions. They may have a national, regional or city-wide remit. They may be entering old age or newly formed. They may have an extensive staff or rely almost entirely on volunteers. They may be well endowed or run on a shoestring budget. Common to all is their role as a champion of the environment – built, natural and intangible.

Objectives: Among their primary objectives are:

- Promoting conservation of cultural assets and recognition of the value of the historic environment among civil society and government
- Influencing government and decision makers in heritage and environmental matters
- Developing support and participation from civil society
- Sharing experience to encourage the spread of good practice
- Promoting a culture of care for historic places and their stories

Functions: According to the specific circumstances of each trust, these include:

- Conserving places for public access
- Carrying out programmes that inform visitors about the history and meaning of sites
- Property ownership or other property management formulae
- Membership or constituency backing
- Focus on cultural and/or natural heritage
- Safeguarding intangible heritage
- Contributing to cultural tourism
- Advocacy for conservation and related research

⁶ <https://intoorg.org/wp-content/uploads/2017/07/Tapuwaeh-2017.pdf>

Constitution: There are three main types of heritage trusts: autonomous civil society or non-governmental organisations; government agencies (in some cases semi-autonomous); and mixed organisations that receive some direct government support. Each has advantages and disadvantages in regard to access to core funding, scope for voicing opinions that may or may not concur with those of government, and possible roles.

Autonomous civil society organisation: The majority of national heritage trusts are autonomous civil society organisations in the model of the Massachusetts (USA) Trustees of Reservations (founded 1891) and the National Trust of England, Wales and Northern Ireland (founded 1895). These organisations are not dependent on government funding, although they may be eligible to apply for specific grants or programmes. They are established in accordance with national and local legal and fiscal practice, the latter vital for financial sustainability. They often are considered as a charity and as such comply with the regulations set by a government charity commission or similar body. Their independence allows them to play a strong advocacy role and challenge government and private interests when the latter run counter to protecting the historic environment. They often complement the work of government, for example in carrying out activities that are outside the core remit of government. As charities, they rely for income on membership fees, donations and revenue raised from their commercial operations.

Governmental agency: There are numerous National Trusts that are INTO Associates which are government bodies. While they are charged with the care of the historic environment, they do not have the independent status to challenge government decisions. One Caribbean organisation, for example, has been faced with a crisis linked to its opposition to a government planning decision and its subsequent revocation of funding. Many of the governmental heritage bodies are property owning and set government policy. Staff members are generally recruited according to civil service rules. Their funding is determined by the national budget which on occasion can be topped up by special grants. Frequently they work in coordination with other government departments, such as culture, tourism or education, as well as universities and other educational institutions.

Government Sponsored Heritage Trusts

It is not unusual in countries with small populations or where civil society organisations are thin on the ground for heritage trusts to be government administered. Among examples are:

In Fiji, the National Trust of Fiji is a statutory body funded jointly by the Government of Fiji, independent sponsors and multilateral donors. Established in 1970 to provide protection of the country's cultural, and natural heritage, it is the only national trust in the South Pacific. Over its lifetime it has moved between the Ministry for Women, Culture and Social Welfare, the Ministry for Tourism, Culture and Heritage, the Ministry of Fijian Affairs, and the Ministry for Education. It is governed by a Council elected by the Minister of Education.

In Trinidad and Tobago, the National Trust of Trinidad and Tobago, plays a role in education, research and conservation. It has a wide remit which straddles public engagement and regulation. This dual character has led to some confusion as to whether it is an arm of government or a citizen movement. At present it sits within the Ministry of Planning and Development with a National Trust Council and Chief Executive Officer.

Other examples include the French organisation, Le Conservatoire du Littoral. Inspired by the National Trust of England, Wales and Northern Ireland's Neptune Coastline Campaign but set up as government agency, it entrusts land management to private/community groups.

A mixed model with some direct government support: Other heritage trusts belong to a mixed model, which combines membership with direct government support. Among these are the National Trust of Barbados and the National Trusts of Australia. The National Trust of Saint Helena⁷ and the Falklands Islands Museum and National Trust⁸ are other examples. They operate under government jurisdiction but may have the ability to determine their own programme of activities, recruit volunteers, and raise additional funds for specific activities. Membership is a feature of some of these mixed trusts. Most are property owning.

Some Practical Guidance on Heritage Trust Objectives and Functions

ISSUES TO CONSIDER	COMMENTS
<ul style="list-style-type: none"> • An urgent situation gives rise to civil society efforts to combat loss of heritage 	<ul style="list-style-type: none"> • Are the urgent issues which have been identified sufficient to sustain an organisation or is the response time limited?
<ul style="list-style-type: none"> • Does a belief in heritage for all find expression in the heritage trust? 	<ul style="list-style-type: none"> • Consider ways in which the heritage trust can respond to broadening its constituency and counteract an impression of serving the elite.
<ul style="list-style-type: none"> • What are the advantages and disadvantages of the three types of heritage trust organisations in the specific context of its operation? 	<ul style="list-style-type: none"> • Fully independent organisations do not have the cushion of government financial and logistical support but can be outspoken in their positions. Government agencies benefit from government allocations yet they may be constrained in expressing views that differ from those of government. Mixed model organisations may be hampered by a lack of clarity in their role and level of autonomy.
<ul style="list-style-type: none"> • Does the regulatory and legal framework in country give space for a heritage trust? 	<ul style="list-style-type: none"> • In some countries, setting up a heritage trust independent of government is not straightforward. Are there other options that would allow for civil society involvement?
<ul style="list-style-type: none"> • What is the comparative advantage of the trust? 	<ul style="list-style-type: none"> • Identify what are the unique attributes of the trust, and what they can do that is currently left undone, whether analysing the impact of proposed new developments in protected areas, commenting on policy or developing educational programmes.
<ul style="list-style-type: none"> • How important is membership? 	<ul style="list-style-type: none"> • Membership is central to many heritage trusts but there are others which work on the basis of supporters. Without a substantial portfolio of properties, it is often difficult to attract paid members.

The 'how' of heritage trusts will be the subject of the following chapters on starting up a heritage trust and laying the foundations for survival.

⁷ <http://www.sainthelena.gov.sh/wp-content/uploads/2017/02/SP-01-SHNT-2014-15-Annual-Report-Financial-Statements.pdf>

⁸ <http://www.falklands-museum.com/founding-partners.html>



STARTING A HERITAGE TRUST

CHAPTER THREE

THIS CHAPTER CONSIDERS HOW TO SET UP A HERITAGE TRUST, LOOKING AT LEGAL STATUS, GOVERNANCE AND THE ROLE OF BOARDS AND COMMITTEES, STAFFING, AND VOLUNTEERS.

Given that each start-up will be context specific, comments are offered on the principles and process. Resources available to new start-ups are also specific to the particular situation. Some trusts operate in constrained environments, especially those in Sub-Saharan Africa, while others can count on relatively well endowed societies where membership organisations are more common.

Origins and Causes

The familiar story of origins of the National Trust in England, Wales and Northern Ireland is worth repeating. A small group of determined individuals came together to counter the loss of landscape and historic buildings at a time of social and technological change and formed the National Trust. Its growth to 5 million members in 2017 points to the role of champions, historical circumstances, the importance of legal and fiscal design, and the ability to respond to current needs and opportunities.

Heritage trusts are often established in response to a particular crisis or failure of existing policy or leadership. It may have to do with inadequate planning policy or loss of landmark buildings, prime coastline or green space.

Among the cause-based heritage trusts are the Yangon Heritage Trust, the Czech National Trust, Pro Patrimoni (Romania), and the National Trust of Korea. Heritage trusts are under discussion in the Republic of Georgia, Kosovo, Albania, and Thailand. These organisations become a rallying point for concerned citizens.

SOME IMPORTANT START-UP QUESTIONS:

- What are the goals of the heritage trust?
- What places will it protect and stories will it tell?
- What other roles will it play?
- Who are the key stakeholders who should be involved?
- What existing resources are there to draw upon in support of the trust?
- Is it the right time to initiate a new organisation?
- What first – tie up all the legal and governance matters or to get on with the job of saving/doing something?
- How does the proposed trust relate to other heritage conservation activities?

//Image: The INTO Central European Project visit to Culzean Castle, National Trust for Scotland, contributed to the establishment of a National Trust in the Czech Republic

From Australia to the Czech Republic: Conservationists take Action

According to her biography, Annie Wyatt deplored the ruinous state of two Georgian mansions in the Sydney suburbs, Greystanes and Bungarribee. The demolition of Burdekin House, Macquarie Street, in 1934 and the Commissariat Stores at West Circular Quay in 1939 (which she described as ‘official vandalism at its worst’) galvanised her into action. In 1945, inspired by the model of the National Trust movement in the UK, she and her associates established the National Trust of Australia (New South Wales) to protect early colonial buildings and bushland that were faced with destruction. The Trust was first guided by a provisional committee, and with its official foundation on 5 November 1947 by a council on which Mrs. Wyatt served until her death in 1961.

Dr Irena Edwards, Chairman of the Czech National Trust, has noted that ‘the Communist era was not kind to cultural monuments. It left properties uncared for, changed their use – often to their detriment – and instilled in the people a feeling that heritage had nothing to do with them.’ Inspired by the worldwide National Trust movement, the Czech National Trust aims to ‘grow awareness and pride within local communities; help them love and adopt these places; and start a grassroots movement to preserve them for future generations.’

/ National Trust of Australia; Czech National Trust

Yangon Heritage Trust: Revitalisation not Demolition

In 2012 a group of architects, historians, businesspeople and others banded together to form the Yangon Heritage Trust (YHT) as a last ditch attempt to preserve Yangon’s unique character. This was a time when Myanmar was exiting from decades of isolation and Yangon was experiencing intense development pressure with no effective planning framework to protect its considerable built heritage. Many of its heritage buildings were crumbling and in danger of being torn down.

The early mission of YHT was to raise awareness of the city’s heritage assets and to encourage government authorities to protect them. This advocacy – using national and international media and persuasion – gained traction at the national and regional level with a change in government. The Yangon City Development Committee began to move away from supporting demolition of heritage buildings.

By mid-2013 YHT became increasingly focused on broader urban planning issues. This expanding scope stems from the realisation that the economic and social benefits of conservation must be clear to decision makers and the public. In early 2014 it drafted a set of proposed first generation regulatory tools including a Yangon Heritage Conservation law, a heritage planning framework and guidelines for managing change to heritage places and conservation areas.

The product of this analysis is the Yangon Heritage Strategy: Combining Conservation and Development to Create Asia’s Most Liveable City, which puts forward a vision for Yangon. Working with local partners and government bodies, the Trust has assisted Yangon to achieve what no other city of its scale and economic importance has in the Asian region: avoiding a wave of unregulated demolitions which have dismembered so many other historic centres.

Currently YHT is the only dedicated organisation looking at urban heritage issues in Yangon and how they relate to making it a liveable and modern city through physical conservation and good urban planning. It provides advice to relevant government agencies on request and support to many building conservation projects, and carries out advocacy and research tasks. Its staff is assisted by volunteers and students.

// Image: Yangon Urban Heritage Conservation Law, Yangon Heritage Trust

⁹ <https://intoorg.org/encyclopedia/yangon-heritage-trust>



Setting Up

There is considerable advice available about how to set up a civil society organisation. Whether it is classified as a charity or non-governmental organisation depends on the national legal framework. Irrespective of which structure the heritage trust will operate under, one of the most useful and well tested sources of guidance is the UK Charity Commission which works with a broad range of charities. The Charities Aid Foundation¹⁰ is another mine of information

It has defined seven basic steps for setting up:

1. **Consider whether a charity is the right option:** Charities exist to benefit the public and are eligible in many countries to receive tax relief, and get certain types of grants or funding and other allowances. In turn they are restricted in what they can do and how they work.

Another alternative may be to set up a non-charitable social enterprise. A social enterprise is a business that has social, environmental or community based objectives and can have non-charitable purposes.

2. **Define the charity's purpose:** A charity can have more than one purpose but it cannot have any purposes that are not charitable.
3. **Choose a charity structure:** There are four main types of charity structure (under UK law): charitable incorporated organisation; charitable company limited by guarantee; unincorporated association; and trust. The type of structure affects how the charity will operate. Most heritage trusts are considered to be a corporate body which allows them to employ paid staff, deliver charitable services under contractual agreements and own land or other property. Most also have a wider membership.
4. **Write a governing document:** The governing document creates the charity and says how it should be run.
5. **Choose a name:** The name is important: it is the charity's brand, and what people will remember.
6. **Find trustees** (also called board or committee members): Charity trustees are the people who serve on the governing body of a charity.
7. **Fund the charity's work.** The funds raised must be held safely and properly accounted for. The charity will need a bank account.¹¹

Social Enterprise

A social enterprise is a business created to further a social purpose in a financially sustainable way. They are sustainable: earned income from sales and other revenue generating activities is reinvested in their mission. They do not depend on philanthropy and can sustain themselves over the long term. They are scalable: their models can be expanded or replicated to other communities to increase impact. Social enterprises apply commercial strategies to maximise improvements in

¹⁰ <https://www.cafonline.org/>

¹¹ <https://www.gov.uk/topic/running-charity/setting-up>

human and environmental well-being. This may include maximising social impact alongside profits for external shareholders. In many cases they provide income generation opportunities that meet the basic needs of people who live in poverty. It is possible for heritage trusts to adopt this business model.¹²

Setting up is of course dependent on the specificities of the three types of heritage trusts. An overview of each type is provided below:

SETTING UP QUESTION	CIVIL SOCIETY ORGANISATION OR CHARITY	GOVERNMENT	MIXED MODEL
Legal form	Generally determined by the country's charity law – legal mandates may include preservation of the historic and natural heritage and care for properties which the trust has acquired	In accordance with Government regulations	In accordance with Government regulations
Relationship with Government	Independent although may be eligible for Government grants	Part of Government	Dependent on Government but with ties to civil society
Governance structure	Variable – often a board structure	Determined by Government – usually consistent with civil service rules	Variable but typically as per Government departments
Staffing	May be a later phase	Filled by Government	Filled by Government
Volunteers	Essential	Rare	Generally welcomed

Legal Status and Issues

The legal status of a heritage trust is dependent on the relevant national legal framework. It may be an 'enabling' legal environment or in some cases, one in which gaining legal status is difficult. For Commonwealth countries, the Charity Commission or its equivalent is an important source of guidance.

A key test in many countries is that of public benefit.¹³ Public benefit has two parts: a purpose must be beneficial in a way that is identifiable and capable of being proved by evidence where necessary and which is not based on personal views; and any detriment or harm that results from the purpose (to people, property or the environment) must not outweigh the benefit, also based on evidence and not on personal views. Ensuring compliance with local regulations will need particular care.¹⁴

¹² <https://www.gov.uk/guidance/how-to-set-up-a-charity-cc21a>

¹³ <https://www.gov.uk/guidance/public-benefit-rules-for-charities>

¹⁴ <https://intoorg.org/wp-content/uploads/2017/07/Public-benefit-analysis-of-the-law.pdf>

Another important legal issue relates to the fiscal status of the organisation which takes its cue from the respective national legislation. Questions of value added tax, property tax and inheritance tax vary according to jurisdiction.

Some Legal Considerations

The newly formed Czech National Trust has encountered several legal issues, primarily related to the incompatibility of the UK and Czech Republic legal systems and the legal status of membership organisations.

In the Czech Republic no special charity law existed when the Trust was established. Therefore it was difficult to marry up the English Trust system with the Civil Code of the Czech Republic. Of the three possible 'not for profit organisations' on offer in the Civil Code, none was entirely satisfactory. The best option was the *obecně prospěšná společnost*, abbreviated as 'o.p.s.' (a general company for public benefit). To complicate matters in 2014 a new Civil Code came into existence and this option is no longer represented.

A membership base was not allowed under the o.p.s. One solution was to simply have a database of supporters or Facebook followers and call them 'Friends of CNT'. But because of the importance of membership - for fees, recruiting volunteers, donors and supporters – this was not a long term solution.

The Trust is currently exploring a new corporate format. In order to be independent, establishing a purely local not-for-profit organisation (or company according to local definition) using the necessary safeguards provided by the local legal system seems to be the best path.

The National Trust for Land and Culture, Canada will comprise 14 provincial organisations grouped into a federation. As a young organisation, it is focusing on the building blocks of its constitutional and legal framework and operating systems. The National Trust for Land and Culture British Columbia was established in 2013 with the mission 'to engage people in the protection and on-going care of special places in British Columbia'.

/ Czech National Trust; National Trust for Land and Culture (British Columbia)

National Trust of Georgia

Inspired by the National Trust of England, Wales and Northern Ireland, the National Trust of Georgia follows a similar structure and ethos. In addition to protecting Georgia's historic architecture and landscape, it also sets out to educate and encourage the local population into the vital and ongoing processes of cultural preservation.

In its first year, the Trust has established bank accounts, a board, a constitution, designed a logo and acquired its first property! 33 Metekhi Street in Tbilisi will act as an office and exhibition space. As one of the most recently established Trusts, the founders offer the following tips on working with a new board:

- "Choose a board carefully with people that work well together and are themselves well connected in the field
- Minute every significant board meeting – so there can be no doubt about what was said
- Be flexible and prepared to go with the will of the majority, even if you do not agree
- Try and make the board meetings fun and interesting – not too formal – creating the Trust should be enjoyable
- If possible have a friendly lawyer on board
- Keep all board members informed if they miss events or meetings so nobody feels side-lined"

/ National Trust of Georgia

A National Trust for Uganda

During the International Conference for National Trusts held in Entebbe in 2013, all the Ugandan delegates appreciated the valuable contribution a trust can make to national heritage conservation and advocated for the establishment of a Uganda National Trust in Uganda. In a subsequent study carried out by the Cross-Cultural Foundation of Uganda (CCFU), the need to establish a National Heritage Trust was further confirmed and highly rated.

In the course of CCFU's work over the past ten years they have come across a number of historical properties that have since been demolished or are in desperate need for restoration and at risk of being demolished. This situation reaffirmed the need for a body to protect these properties (in the absence of any effective Government legislation). As a flagship project for the proposed Heritage Trust, the Foundation chose to protect at least one historical property. Limited awareness of the importance of preserving historical properties poses a real challenge: the proprietors of some of these historic buildings (typically families) have difficulty in understanding a conservation objective (rather than a commercial agenda) for preserving their properties.

It has therefore taken more time than CCFU anticipated to consult and gain consensus amongst the property owners on the need to preserve their building. Progress is two tracked: working with the owners and commissioning an architectural assessment of the historical building in question, followed by a management plan. This will require technical expertise to restore and carefully protect the integrity of the flagship project building, an expertise not readily available in-country.

With the assistance of INTO, and in consultation with some of the key stakeholders in the culture sector, CCFU drafted an 'Ordinance for the Protection of Historical Properties in Kampala'. The Ordinance outlines protection measures as well as motivational measures for proprietors to maintain the integrity of their historical properties. Unfortunately, the vetting and approval process for the Ordinance is likely to be drawn out because cultural heritage does not take priority over national political debates - in the meantime more historical properties are being demolished.

The purpose behind the establishment of a national level heritage trust is to raise awareness of the importance of properties of historical and cultural significance and to bring together a critical mass of stakeholders who can lobby for the promotion and development of this important aspect of Ugandan national heritage. With support from INTO and other heritage focused institutions, the Heritage Trust would provide much needed technical support to conserve historical properties in Uganda.

/ Cross-Cultural Foundation of Uganda

Governance and the Role of Boards and Committees

An integral element of setting up a heritage trust is to clarify its governance. Governance can be thought of as 'the systems and processes concerned with ensuring the overall direction, effectiveness, supervision and accountability of an organisation'. In many countries there have been significant developments in what is expected of charities, their practices and the legal framework in which they operate. Voluntary and community organisations working for public benefit are increasingly expected to demonstrate how well they are governed. There are numerous sources of information including The Association of Chief Executives of Voluntary Organisations¹⁵ and the National Trust of England, Wales and Northern Ireland's own Governance Handbook.¹⁶

¹⁵ <https://www.acevo.org.uk/>

¹⁶ <https://www.nationaltrust.org.uk/documents/governance-handbook-2016.pdf>

Trustees take ultimate responsibility for the governance of their organisations. But governance is also the way trustees work with staff, volunteers, members and other stakeholders to ensure their organisation is properly and effectively run and meets the needs for which it was set up.

Six key principles of good governance can be defined:

- Understanding roles and responsibilities
- Ensuring delivery of organisational purpose
- Working effectively both as individuals and as a team
- Exercising effective control
- Behaving with integrity
- Being accountable and open

The applicability of a governance code to different sizes and types of charities, especially smaller organisations, raises a number of questions. This proportionality – is it too much to expect for small charities and not enough for large ones – will need to be reviewed by each organisation.¹⁷ Common issues include: separation of responsibilities between trustees, staff and volunteers; managing potential conflicts of interest; board review (e.g. size requirements and tenure); and public disclosures versus privacy of trustees' interests.

The Board

The board should not seek to participate in the details of every decision. All boards face the dilemma of, on the one hand, trusting management fully to run the organisation in the way the board has laid down or, on the other hand, taking a hands-on approach and potentially interfering too much. Many boards appoint sub-committees to handle operational issues.

Committees

For start-up trusts a few committees may be sufficient to undertake the more detailed work needed to support the work of the trust – most likely each meeting monthly. Over time additional committees may be added. Committees may not be judged as necessary by some of the smaller trusts. Many trusts function with a:

- Membership Committee – to generate interest among and find new corporate or individual members, and to support the Membership Director;
- Communications Committee – to devise and oversee the trust's strategy for all aspects of public affairs;
- Audit Committee – to oversee the financial and other governance aspects of the trust. This committee sets audit policies and ensures they are properly followed;
- Finance and General Purposes Committee – to handle all other aspects of strategy and advice. This is the Committee that, typically, is closest to management. It handles matters ranging from regular scrutiny of the accounts, to human resources, procurement and other important internal matters.

¹⁷ <https://www.charitygovernancecode.org/en/>

Specialist Committees – National Trusts of Australia

The National Trusts of Australia have created a number of specialist committees to support their conservation, education and advocacy activities. They are of two types: Board Committees and Expert Committees. In the case of the National Trust of Australia (Victoria) they are as follows

Board Committees include:

- Aboriginal Advisory
- Governance and Risk
- Buildings and Estates
- Cultural Collections, Interpretation and Programming
- Heritage
- Finance
- Nominations

Expert Committees include:

- Built Environment
- Landscape
- Public Art
- Significant Trees

/ National Trust of Australia (Victoria)

Staffing – Roles and Responsibilities

At some point most heritage trusts will want to think about engaging paid staff. This will depend on the remit, roles and resources of the nascent or young trust. Considerable guidance is available on what to consider when making staffing decisions for heritage trusts. The National Trust for Historic Preservation, in its booklet Starting with Staff, gives the following advice. You are ready to hire when: the board is maxed out; opportunities are being lost; a major opportunity arises; funding finally comes through; and too many projects are being farmed out to consultants.¹⁸

Although some young trusts may wish to bring on staff, they may not be able to muster the financial resources to do so. Therefore they will need to rely entirely on volunteers or in some cases on staff seconded from other organisations. In such cases the dedication – and persuasiveness – of the leaders will be a key factor of success.

Among the strategies that can be of help are to develop a type of ‘barter’ system to access resources – human or material – to carry out essential projects. Another tactic is to persuade other organisations, for example social enterprises (such as Yunus Social Business, Kiva or Omidyar), local businesses, or aid agencies to provide advice and support.

Yet another strategy is to build incremental support through small activities which enlarge the circle of adherents, and to publicise these activities through social media and the press. It can be a slow and often tedious process, with small gains and a share of disappointment, until there is a breakthrough and it is possible to scale up.

INTO is another resource for start-ups to connect them to potential partners and relevant knowledge.

¹⁸ <https://intoorg.org/wp-content/uploads/2015/09/2111.StartingwithStaff.pdf>

Feasibility studies for new heritage trusts, such as the proposed Hong Kong Heritage Trust, typically analyse staffing needs in relation to core functions. In this case four functions were defined:

Functions and Staffing Needs: An Analysis from Hong Kong

Core functions are:

CONSERVATION FUNCTION

- Taking forward selected heritage conservation and revitalisation projects that would serve as pilot activities to demonstrate how the built heritage can benefit Hong Kong.

TECHNICAL AND RESEARCH FUNCTION

- Developing a programme of research and technical studies, in cooperation with universities and relevant government bureaux.

EDUCATION FUNCTION

- Fostering public awareness of heritage through education and public programmes such as exhibitions, lectures, tours, workshops and the setting up of heritage trails etc. These activities would be aimed at families, school age children, as well as the public at large.

PUBLIC AFFAIRS FUNCTION

- Serving as a focal point of contact on heritage conservation matters both locally and overseas;
- Liaising with other heritage trusts and the International National Trust Organisation to promote learning and exchange of experience.

To carry out these functions, the trust is likely to need:

- A Finance and Administration Team to keep statutory and management accounts, install and monitor financial systems (such as those for collection of both donations and fees from the public). This team will need to ensure the financial viability of the trust;
- A Conservation Team to ensure the trust's properties are well conserved, efficiently managed and offer genuine amenity value to the public. This team would develop the technical and research functions, which could be outsourced as appropriate;
- A Membership Team to recruit and service members;
- A Volunteer Team to recruit and manage volunteers;
- An Education Team to devise and carry out educational programmes;
- A Communications Team to build and maintain the reputation of the trust, and promote understanding between the trust and the public;
- An Internal Auditor (possibly sub-contracted or part-time, initially) to prepare the Annual Report;
- A Chief Executive Officer or Director to manage and oversee the entire organisation.

In setting up in-house teams to carry out / support the trust's functions, some of the non-core works could be totally or partially outsourced so as to maintain an appropriate size of workforce. Experience of INTO members points to the importance of getting the right Director and the right first members of staff.

Staffing in any heritage trust is not static; it requires ongoing assessment to help the organisation meet current needs and opportunities. The National Trust of Canada is an outstanding example of new staffing supporting new initiatives in order to broaden the Trust's appeal while creating new revenue streams. At the same time they were able to introduce productive new working relationships between staff and board.

New Staffing and New Initiatives: National Trust of Canada

In 2014, the National Trust for Canada made a strategic decision to invest in new staffing with a focus on building the organisation's capacity in business development. In retrospect they believe it was the smartest move they could have made. In parallel they needed to build their fund development around new initiatives with the potential for profile and impact on the ground.

Their pre-existing programmes and activities had limited appeal for the general public and for major corporate partners, so to simply invest in fundraising advice and conventional fundraising approaches would not have been game-changing. It was their Chair who impressed upon the staff his opinion that their best path forward would be to find one or more results-oriented and impactful programmes and projects that would attract the imagination of corporate partners and major donors, as a way to build their profile and potential.

They began pitching a project that they knew was a great idea – a competition and crowdfunding platform called This Place Matters – to potential corporate partners. Quite early in the process they were fortunate to get a substantial contribution. One of the success factors was an investment in very professional pitch materials designed by a marketing firm. This Place Matters was a huge early success, with great media uptake and public participation, and the National Trust of Canada continues to grow the programme as an important means to generate funds for heritage projects. The campaign is inspired by the successes of the US National Trust for Historic Preservation as well as 'History Matters: Pass it On' in the UK.

A second major initiative driven by the new business development staff was to launch a social enterprise, where the Trust offers expertise, training and coaching services in property and community regeneration to paying clients (such as municipal governments) at market rates. The concept is that profits earned in this way can be reinvested in fulfilling their charitable mandate, allowing the Trust to offer similar services to clients that do not have the ability to pay. They are already securing substantial contracts across the country.

Concurrently, of course, the staff have also been ramping up their annual appeals, stewarding donors, expanding the corporate sponsorship programme for their annual conference, and building their readiness for planned giving.

In 2017 the Trust created a board-staff task force to focus in detail on opportunities for fund development and revenue generation – a powerful opportunity to challenge assumptions and explore opportunities that the Trust might not otherwise have considered. Perhaps most importantly, this joint board-staff initiative has contributed to a culture of philanthropy for the organisation, where increasingly financing is seen as a shared responsibility.

/ National Trust of Canada



Volunteers

For many heritage trusts, whether small or large, volunteers are crucial to the delivery of their objectives. There is considerable guidance already available on recruiting, training and retaining volunteers in the literature on voluntary organisations and national trusts. The Cross Cultural Foundation of Uganda, BPPI (Indonesian Heritage Trust), Din l'Art Helwa (the National Trust of Malta), and US National Trust for Historic Preservation are among heritage trusts with strong volunteer and local participation programmes.

INTO investigation suggests that volunteers are recruited by word of mouth, through databases and social media communications, and through notices in neighbourhood gathering places such as social clubs and churches. One heritage trust held an Open Day at its properties to invite interested members of the public; that yielded some of its best people. Without exception, heritage trusts report that there are never enough volunteers. It is a particular challenge to recruit volunteers when many retired people continue to work or help with grandchildren. Perhaps the most serious challenge is to recruit young volunteers, who are too busy working and rearing children.

Retention poses a challenge for many trusts – either because of competition from other charities or scheduling difficulties. One National Trust is promoting flexibility for its volunteers: they can volunteer digitally, bring their family for a working day or make an arrangement that suits their other commitments. Developing systems that recognise the contribution of volunteers is another important strategy to keep volunteers.

With more than 70,000 volunteers, the National Trust of England, Wales and Northern Ireland is a world leader in volunteering.¹⁹ Among current areas of experimentation aimed at retaining and increasing its volunteer base are: using volunteering as a path to employment; training volunteer managers; and attracting a new generation of volunteers. Another source of advice on volunteering comes from the National Trust for Scotland which has produced a Volunteer Handbook.²⁰

Volunteers for Research and Outreach

The Ruan Yisan Heritage Foundation, the first working on heritage conservation in China, operates extensively with volunteers to raise the awareness of people and government. The Foundation organised some 50 volunteers to investigate historic cities and towns alongside Grand Canal from Hangzhou to Beijing where they also interacted with the local government and community to raise the awareness of importance of the Grand Canal as cultural heritage.

In Shanghai the foundation brought around 80 students of architecture and sociology to investigate the Linong area, mapping the residence situation, the community environment and living condition. Both cases led to recommendations to government for urban conservation.

With REMPART, the Ruan Yisan Foundation has sponsored heritage conservation work camps for young volunteers between France and China since 2010.

All these activities are aimed at growing support and attention, and getting more people involved in heritage conservation. The Foundation also cooperates with government on conservation projects; assists the heritage sites; and gives awards to organisations and individuals who have made significant contributions to the conservation of heritage in China.

/ Ruan Yisan Heritage Foundation, China

// Image: REMPART and Ruan Yisan Heritage Foundation working holiday collaboration, Pingyao, China

¹⁹ <https://www.nationaltrust.org.uk/volunteer>

²⁰ <https://intoorg.org/wp-content/uploads/2017/08/NTS-Volunteer-Handbook.pdf>

An Overview of Start-up Challenges

Experience gained by INTO in the last decade points to some common challenges for start-ups, and possible mitigation measures.

Common Issues for Start-ups and Mitigation Measures

ISSUE	POSSIBLE MITIGATION MEASURE
<ul style="list-style-type: none">• Creating a distinct identity for the organisation	<ul style="list-style-type: none">• Articulate a clear statement of purpose that differentiates the trust from other existing organisations
<ul style="list-style-type: none">• Finding a champion as CEO/Chair who will dedicate the effort required to launch and then sustain a new organisation	<ul style="list-style-type: none">• Clarify the commitment required by a CEO/Chair over the term of office
<ul style="list-style-type: none">• Forming a board that is fit for purpose	<ul style="list-style-type: none">• Analyse the trust's needs related to skills and political connections
<ul style="list-style-type: none">• Defining governance processes and arrangements	<ul style="list-style-type: none">• Study relevant policies and examples and tailor to suit the aims of the trust in line with any government requirements
<ul style="list-style-type: none">• Agreeing on achievable goals	<ul style="list-style-type: none">• Develop a 1 to 3 year work plan with clear intermediate objectives
<ul style="list-style-type: none">• Achieving legal recognition	<ul style="list-style-type: none">• Seek good legal advice, consult with Government agencies which regulate charities and NGOS, and be prepared for technical discussions
<ul style="list-style-type: none">• Securing seed money for starting	<ul style="list-style-type: none">• Persuade donors – not only traditional donors but new entrants – of the worth of the new organisation
<ul style="list-style-type: none">• Competing with other organisations for the public's support	<ul style="list-style-type: none">• Stake out ground that does not duplicate the efforts of other organisations
<ul style="list-style-type: none">• Navigating relationships with Government	<ul style="list-style-type: none">• Discuss the trust with Government decision makers and identify areas of mutual interest
<ul style="list-style-type: none">• Attracting – and retaining – key staff and volunteers	<ul style="list-style-type: none">• Create a friendly and positive work environment with choices of roles that meet different interests and needs
<ul style="list-style-type: none">• Delivering a programme of activities	<ul style="list-style-type: none">• Match ambitions with resources
<ul style="list-style-type: none">• Harnessing tourism interest	<ul style="list-style-type: none">• Understand the tourism market and devise a menu of visits that are attractive to tourists
<ul style="list-style-type: none">• Evaluating repair, maintenance and investment costs for properties	<ul style="list-style-type: none">• Engage specialist conservation architects to assess condition and likely costs
<ul style="list-style-type: none">• Designing an attractive benefits package	<ul style="list-style-type: none">• Provide potential members with a good offer
<ul style="list-style-type: none">• Setting realistic monitoring and evaluation targets	<ul style="list-style-type: none">• Refer to best practice, develop a practical set of key performance indicators which are understood by staff and establish baseline data

Volunteers: Some Common Management Issues

Attracting, managing and retaining volunteers is a common management issue for nearly all heritage trusts.

INTO Members have commented on the need to:

- Attract volunteers in the face of competition from many other charitable organisations in a small community.
- Organise and manage volunteers, to harness their enthusiasm and distribute tasks.
- Motivate volunteers who can lose interest, move away, etc. and may not have enough commitment.
- Engage volunteers to work on common projects. 'The real work on real projects is not just standing around.' Some volunteers see their participation as 'staying in contact'.

The National Trust of Australia is developing national standards and a comprehensive online programme for the identification and recruitment, training and development, evaluation and rewarding of volunteers.

Competition from other types of civil society organisations is not infrequent. For example in Thailand, the Thai Cultural Hub – a new institution that brings together citizens to debate and collaborate, using a 19th century building and links with the Royal Society of Art (UK) – is seeking funding from investors to support the building of civil society and nurturing creativity across Thailand, and to provide a platform for debate, multi-disciplinary collaboration and space for new ideas. To date there does not seem to be much coordination among the different interests.



ENCOURAGING PUBLIC ENGAGEMENT AND PARTICIPATION

CHAPTER FOUR

HERITAGE TRUSTS ARE ABOUT HERITAGE FOR ALL AND EMPOWERING LOCAL COMMUNITIES AND CIVIL SOCIETY TO COME TOGETHER TO SHARE THEIR HISTORY AND HERITAGE.

To build democratic societies that are based on respect for human rights, there is a need to actively engage the public in issues related to the past and their vision for the future. Engaging youth will be a key requirement for sustainability and relevance.

- Who are the main stakeholders who need to be involved?
- How can youth be brought into the heritage conservation movement?
- What is the scale and scope of outreach and how can it be carried out most effectively?
- How can local communities become equipped to look after their heritage?
- How can heritage places be activated as catalysts to promote dialogue and debate about the past, present and future?

Civil society and the voluntary sector play a large and vital role in heritage conservation. Throughout the world every year hundreds of thousands of people give their skills and time to protect their heritage. Governments have recognised the large contribution that voluntary organisations make to heritage protection, including through the planning system.

In some countries, ‘amenity societies’ defined as voluntary societies established with the purpose of preserving historic art and architecture or their equivalent have a legal role as well.

In the UK, under the Arrangements for Handling Heritage Applications – notification to Historic England and National Amenity Societies and the Secretary of State (England) Direction 2015,²¹ local planning authorities are obliged to consult specified amenity societies on all applications involving the partial or total demolition of a listed building.

There are many other local history and special interest societies that may become involved in the process of planning and listed building control, albeit without formal notification.

// Image: Cross-Cultural Foundation of Uganda

²¹ <https://intoorg.org/heritage-applications/>

**“And this popular
support, endlessly
generating new ideas,
challenges and interest, is
what has driven heritage
protection forward”**

*/ Fiona Reynolds, *The Fight for Beauty**

What is Public Engagement?

Public engagement – also termed stakeholder engagement – is part of the DNA of most heritage trusts. Many put engagement in first place. Increasingly they are counteracting a perception that they are an elite club by demonstrating that they are true civil society organisations.

As a result of increased scrutiny by international development agencies and national governments in regard to potential negative environmental and social impacts or involuntary resettlement from projects, the last decade has seen stakeholder engagement and public consultation become a rigorous endeavour. There are now a number of useful guides discussing stakeholder engagement.

“A stakeholder is a group or an individual who can affect or is affected by the achievement of the organisation’s objective.”

“Stakeholder engagement is about knowing who your stakeholders are, understanding them and knowing how best to involve them...”²²

Approaches to Public Engagement

How can public engagement and participation be achieved? As with any other aspect of heritage trusts, local circumstances often dictate what is most appropriate and effective. INTO Members and other heritage trusts handle public engagement and participation in a variety of innovative ways. The following paragraphs present a number of these approaches and tools. Membership is an important framework for the majority of heritage trusts. Other approaches include creating a union of local associations; using a heritage site to offer a range of attractive training workshops and hospitality services; holding special festivals, events and exhibits; providing educational opportunities, and carrying out advocacy. And there are many more versions of creative mixes of approaches.

Membership

There are numerous examples of heritage organisations with strong memberships, some of which are based on donations or legacy giving particularly when positive tax incentives exist. Generally membership is easier to justify when a trust has a sizeable property portfolio. Heritage trusts draw

²² <https://gcs.civilservice.gov.uk/wp-content/uploads/2016/04/Stakeholder-Toolkit-210316.pdf>
<https://www.adb.org/sites/default/files/publication/30043/stakeholder-engagement-investment-plans-asia.pdf>
<http://documents.worldbank.org/curated/en/319671468336604958/pdf/492200BR0SecM2101Official0Use0Only1.pdf>

inspiration from the large National Trust membership in the UK, but there can also be a sense of discouragement for smaller heritage trusts without a large property portfolio which is a natural draw for members or without much practice in running a membership programme.

The idea of membership is not widespread in all countries and a donation culture for conservation causes may not always exist. For example, in former Eastern Bloc countries such as the Czech Republic or Albania, the communist legacy left society bereft of a will to volunteer (i.e. do anything without pay), suspicious of joint action (as they were forced to do under previous regimes) and thinking that heritage had nothing to do with them since it was for the state to care.

In these countries heritage trusts are rebuilding a heritage-related, volunteer culture. In other contexts, such as Hong Kong, while a society's generosity for giving and donating is manifested during times of emergency or crisis, typically there are few public (as opposed to professional) membership-based organisations. This can be a potential hurdle to attracting members. In Sub-Saharan Africa, governments may 'crowd out' civil society and membership organisations in order to reduce the possibility of independent thinking and criticism.

Growing a membership is also an issue. Most trusts begin with a core group of dedicated conservationists and grow incrementally. In order to do so they must be able to compete with other charities for members and should attract a culturally diverse audience. Therefore new organisations will need to take a long term view of potential for membership and plan accordingly.²³

Membership: Tips to Consider

Heritage Trusts use a variety of means to attract and retain members. Here are a few tips. Most importantly, clearly define membership benefits – short and longer term, at the national and international level (for example reciprocal benefits with other national trusts):

- Compare membership benefits with other similar organisations (such as nature conservation organisations) to ensure competitiveness
- Make the case for the benefits of membership
- Develop a menu of different membership categories with different fees: single, family, student, retired person
- Prepare a membership brochure which invites people to join
- Advertise in relevant media – social media as well as printed media
- At the sites managed by the heritage trust, have either staff or volunteers ready to introduce the public to membership benefits
- Hold special activities and events for members
- Develop partnerships with other organisations (such as museums) or business to offer reduced entrance or prices for members
- Pay attention to membership renewal
- Analyse composition of existing membership and examine ways of extending to new groups

²³ <https://intoorg.org/encyclopedia/membership-development-guide>

Alliances for Outreach

INTO member organisations have been able to increase their outreach and impact by joining together with other like-minded organisations, particularly those with an educational mission.

Engagement with a Local, National and International Scope

The French based Union REMPART believes it would not make sense to preserve heritage without involving the public in community-based projects. Because they are locally established, Union REMPART member associations are all part of a cooperative action and the outcome of the life of their local community.

Union REMPART member associations work on a wide variety of cultural heritage sites: amphitheatres, chapels, priories, castles, villages, mills, railroads... listed buildings or less obvious items of heritage. Each site entrusted to a REMPART member association is part of a local development programme and therefore not only is it preserved or restored, but it is also given a new purpose and actually reused. Moreover, REMPART'S action promotes and preserves traditional building and restoration techniques. This experience with heritage preservation is unique and has been used to guide initiatives in Sweden, Hungary, Israel and Palestine, with REMPART's active support.

The members join the Union in order to strengthen their impacts locally and to join other organisations sharing the same concerns for the involvement of citizens in the restoration process, for the value of heritage as a tool for social inclusion, and for citizen education. Joining the Union is also a way to benefit from services such as the recruitment and insurance of volunteers, shared communications, and sometimes fundraising campaigns. The Union is also able to establish a global dialogue with national and regional authorities: it gives greater visibility to these actions and makes it easier to discuss public support for volunteer heritage work camps organised under the Union standards. Moreover, the Union holds some national programmes to encourage the actions of the members or encourage the participation of the volunteers:

For more than forty years over 20,000 international volunteers from all over Europe and beyond (Morocco, Algeria, China) have worked with REMPART's local associations. Every year more than 3,000 volunteers from France and abroad take part in a voluntary community action for the common good, learning together how to be active citizens of the world.

/ Union REMPART, France

Conservation of Desa Lingga with National and International Support

After the successful nomination and listing on the World Monuments Fund 2012 Watch List, Desa Lingga (Lingga Village) in Indonesia – supported by the Prince Claus Fund – received funds for repairing four traditional buildings namely, Geriten (a place to store the bones and skeletons of family's ancestors), Sapo Ganjang (rice barn), Belang Ayo House and Gerga House (extremely rare traditional Karo dwellings).

Desa Lingga is located in the Karo Highlands, about 100 km from Medan, the capital of North Sumatra Province. Residents still retain the same customs of Karo culture as their ancestors did hundreds of years ago. The Lingga Village is estimated to be around 250 years of age.

From 2012-2014, the Sumatra Heritage Trust led the restoration project, in cooperation with St. Thomas Catholic University and a local vocational school. Traditional building restoration activities were integrated with educational programmes for university students from a variety of disciplines,

including architecture, history and tourism. For this project, the Sumatra Heritage Trust received the 2012 World Monuments Watch Award from the World Monuments Fund.

After the inclusion in the 2012 WMF Watch, there are signs of positive impact on Desa Lingga, notably increased community engagement. A community representative was selected with the aim of safeguarding Desa Lingga traditional culture. Moreover, interest in cultural tourism has grown; members of Karang Taruna Desa (Desa Lingga's youth organisation) are encouraged to practise traditional music and dancing. There is a wider understanding that preserving Karo ethnic traditional culture will benefit the community with more opportunities for education and employment. The local government, through the National Program of Community Empowerment, has given funds to support cultural enhancement in the community, including improvement of public facilities (such as the installation of public restrooms) and infrastructure. It is also contributing to the rescue of two of many collapsed traditional buildings in Desa Lingga.

/ Sumatra Heritage Trust

Properties as a Locus for Engagement

Properties can play a central role in reaching new stakeholders. Individual properties may become a locus for activities of local and wider interest as in the case of Vila Golescu in Romania. Other heritage trusts have expanded the type of properties they look after in order to reflect broader social trends, for example, conserving 20th century architecture, industrial heritage as in Barbados, the heritage of specific immigrant populations or important leaders as exemplified by the Saint Lucia National Trust.

Pro Patrimonio, Romania– the Vila Golescu as a Hub

The Vila Golescu, a handsome early 20th century property built in a neo-Romanian style, was donated to Pro Patrimonio. The villa and its gardens survived the wars and Communist era thanks to the family's descendants who wished to save it as an example of local history for future generations. Pro Patrimonio has opened the villa's doors to varied programme of workshops as well as accommodation and corporate entertainment.

During the landscape workshop at the Vila Golescu for the 2017 season, staff and volunteers carried out repairs to the entrance pavement and the rose pergola, clearing vegetation, and planting new trees, bushes and flowers. In 2017 there were 15 people: 12 participants (5 from the UK) and three staff. The park needs constant maintenance! The Vila Golescu also hosts annual textile restoration workshops.

A new endeavour has been the 'Honest Goods' project that combines contemporary design with traditional crafts. The objects, created by young designers, were exhibited in London, Campulung and Bucharest and are the base of a heritage brand inspired by Vila Golescu.

The Vila employs a housekeeper sponsored by a local company who greets and looks after visitors during the year. Pro Patrimonio has set a recommended tariff for visitors who become members on arrival and donate to the trust to cover board and lodging. The house is also used for meetings and corporate entertainment. Gradually the number of visitors is increasing so as to render the property virtually self-sufficient barring additional unexpected repair and maintenance costs, but it has been a struggle.

/ Pro Patrimonio, the National Trust of Romania



Industrial Heritage Saved by Volunteerism and Strategic Partnerships

The Morgan Lewis Windmill, whose origins can be traced back to the early eighteenth century when Barbados' economy was driven by enslavement, indentured servitude and wind energy, is one of the earliest gifts made to the Barbados National Trust.

Led by the Morgan Lewis Subcommittee of the Barbados National Trust, comprising volunteers and management, and with the goal to open the windmill as a visitor attraction and thereby increase revenues for the Trust, the restoration project received funds from the Tourism Development Corporation. It also had several donations from private donors, who in no small way, have assisted in the restoration project at Morgan Lewis. Further support for Morgan Lewis came with the partnership between the Trust and Barbados Tourism Product Authority (BTPA) in 2017 for the BNT Open House Season and the BTPA's new 'Rum and Sugar' festival.

Volunteers played significant roles in the two phased redevelopment through providing expertise in landscaping, restoration of historic buildings, and as project supervisors.

The Morgan Lewis Windmill is today the most important representation of Barbados' industrial sugar heritage and the only fully restored windmill in Barbados, indeed the whole south eastern Caribbean. So important is the windmill as a heritage site that it has been included in a Tentative Nomination for World Heritage Listing as part of the Island's industrial heritage.

/ Barbados National Trust

Festivals, Events and Exhibitions

Festivals, events and exhibitions are favourite promotional activities of heritage trusts. They may be an annual occurrence, or special one-off event, although all involve year-long preparation and promotion. Among the many examples are the National Trust of Western Australia's 'Having a Voice' festival and Herita's Open Monumenten Day. The Indian Trust for Rural Heritage and Development has held the Azamgarh Festivals to showcase the handcrafts and musical traditions of a cluster of villages in Uttar Pradesh.

Having A Voice, National Trust of Western Australia's 2017 Festival

This Australian heritage festival acknowledges the 50th anniversary of the referendum enabling Aboriginal people to be subject to commonwealth laws and counted in the national census.

Through some 120 events, performances, exhibitions, walks, talks and workshops, the Festival presented seldom heard Western Australian voices. It included an exhibit of quilts celebrating the Whadjuk activist Fanny Balbuk Yoorel, a traditional Swan River woman who lived through the colonisation of Perth and protested the impact of development on her homelands and culture. Another event is Peninsula Farm's 'Giving children a voice' which encouraged families to explore the house from a child's point of view.

The National Trust, which raises awareness of and appreciation for shared heritage in cities and towns across the state, is coordinating the Festival. Made possible by funding from the Australian Government Lotterywest and support from the City of Perth and the Department of Aboriginal Affairs, it is promoted by Curtin FM as well as the National Trust website and social media

Since 1980 the Festival has grown to become Australia's biggest festival of heritage and culture and a demonstration of the involvement of thousands of volunteers and local organisations. The 2017 Festival, with the new name of Australian Heritage Festival, is the product of a drive to be more inclusive and more exciting with greater emphasis on building stronger community engagement.

/ National Trust of Western Australia

Heritage Day – Herita’s Open Monumenten

Herita is a non-profit membership and network association in Belgium that brings people together with a focus on heritage. It is committed to creating a broader community base and support for heritage matters. Its aim is to make everyone, young or old, enthusiastic about heritage. Herita makes sure that everyone can enjoy monuments and heritage sites – now and into the future – by throwing open the door to these important parts of our history and transforming them into places filled with wonder.

It is also developing an Open Heritage Site Network in Flanders. It seeks to become an exchange platform for knowledge, expertise and inspiration. The Open Monumenten Day takes place in September each year.

/ Herita, Belgium

Education Programmes

Educational initiatives, often aimed at children, are important ways to reach stakeholders and sustain memberships.

An Taisce’s Green-School Environmental Education Initiative and Bermuda’s Learning Events

An Taisce the National Trust for Ireland, has developed a number of education programmes. Its Environmental Education Unit operates the Green Schools programme.²⁴ This is an environmental education, environmental management and award scheme that promotes whole school action towards a sustainable environment using a Seven Step methodology. It is a student led programme, in partnership with local authorities and is supported by government ministries. It also has funding from the Toyota Fund for Europe. The themes that it addresses are: litter and water; energy; water; travel; biodiversity; and global citizenship. Among recent activities are a Walk to School Week and a Green Schools ‘Ireland 2040 – Our Plan’ poster competition. It is also coordinating a National Climate Action and Awareness Programme for schools.

The Bermuda National Trust offers a range of educational activities for all ages. As well as learning events for adults and families, it provides curriculum based programmes for Bermuda’s students. At its sites it offers environmental, art and heritage activities. Guided field trips for school groups take place at many of the Trust’s sites and can be linked with a Three Part learning experience that relates to the school curriculum. It also holds group teacher workshops prior to field trips and publishes teacher resource guides for 12 properties or topics.

During the school holidays it offers camps for children: Wild Things, Go Green, Creative Upcycling; Photo Camp; Pirates, Boats and Forts. For teenagers there are volunteer opportunities, an Earth Day Competition, and awards for students and schools. The Bermuda National Trust also holds lifelong learning events.

/ An Taisce the National Trust for Ireland; Bermuda National Trust

Educational opportunities are an important pathway for inclusion and for skills development for young people. Good examples are provided by REMPART and the Barbados National Trust. The National Trust of Zimbabwe and the Monuments and Relics Commission of Sierra Leone also have strong educational programmes for young people.

²⁴ <http://www.antisce.org/greenschools>

REMPART: Education as a Pathway for Inclusion

REMPART has developed among its members a policy of social inclusion. Whenever possible, each of its work camps welcomes up to two people referred to them by social workers (often youth social workers). The idea is to invite members to open doors to everyone while increasing the inclusion efficiency of the work camp, generally comprised of ten volunteers plus two group leaders.

Foreigners are also welcome – students in construction, architecture, history, history of art, French language or simply those curious to meet people ... A REMPART volunteer work camp is an encounter of people coming from different horizons and different social backgrounds

Through work camps REMPART introduces participants to light construction work and jobs that, most of the time, are unknown to the general audience and especially young people. There are many examples of participants who had lost their way personally but, after several experiences with heritage, decided to change their life and learn a restoration or building craft.

/ Union REMPART, France

The Andromeda Botanical Gardens: A Very Green Barbados National Trust Site

Andromeda Botanic Gardens is a historic National Trust property and a Partner Garden of the UK's Royal Horticultural Society (RHS). Created by the horticulturalist Iris Bannochie, the garden was bequeathed to the Barbados National Trust in 1988. Andromeda boasts an incredible collection of over 550 different plant species.

Training individuals in horticulture is a huge part of the mandate of this legacy. Andromeda has been offering courses for many years and in 2016 became an accredited training institution. As well as providing courses for individuals, Andromeda has collaborated with hotels and nurseries providing training for their staff. Courses include training for a Caribbean Vocational Qualification in Amenity Horticulture. Among the learning opportunities are a variety of planting and garden design courses and the extremely popular Organic Herbs and Vegetables Workshop.

The programmes offered at Andromeda Botanic Gardens continue to increase. A summer school 'Kids Get Growing – Food and Flowers' provides an opportunity for children to immerse themselves in growing their own food and ornamental plants organically ... Not only do they grow them, they learn about them, draw them and taste them.

Andromeda offers internships and develops schedules for students wishing to gain practical experiences. While official internships are arranged with the relevant educational institution, Andromeda Botanic Gardens has welcomed, and will continue to welcome, informal applications on a volunteer basis from all those wishing to learn about tropical horticulture.

/ Barbados National Trust

Bringing youth into heritage conservation is particularly important in societies where a large percentage of the population is under 20 years of age and where youth unemployment is high. In some countries heritage trusts have worked directly with formal education systems, as in Ireland, in others with non-formal education. Providing internships or traineeships for students and young people to gain skills in specific areas of heritage conservation – such as archival research, masonry conservation – is another worthwhile approach to readying a new generation of heritage conservationists. The World Monuments Fund, for example has begun a 'Bridge to Craftsmen Careers' programme which is transforming lives of young people from deprived American inner cities.



HANDS OFF
THE COUNTRYSIDE

BJENT
HITNA

ŻVILUPP
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ŻVILUPP
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VIGILO
Din l-Art Helwa

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CCTV

L-AMBJENT
SAHHET
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INSALVAW
Ż-ŻONQOR

FEJN HU
L-IPP JANAR?

Blue polo shirt with a small logo on the chest.

Advocacy Campaigns

Advocacy campaigns are another avenue to build a constituency as is shown in the case of the Siam Society's urban planning efforts. Other examples are Badan Warisan Malaysia (Heritage of Malaysia Trust) which is fighting against inappropriate new buildings.

The Siam Society's Advocacy Efforts to Influence Urban Planning in Bangkok

The Siam Society Under Royal Patronage was established to investigate and to encourage the arts and sciences in Thailand and neighbouring countries. In 2010 the Siam Society set up the Siamese Heritage Trust to advance conservation efforts with the aim of creating a more tangible impact on society, and to coordinate with other conservation groups. This networking resulted in the Cultural Heritage Conservation Alliance (CHeCA), comprising academics, historians, archaeologists, architects and ordinary citizens who care about their communities' heritage, institutions concerned with the built environment and local communities.

In 2012 a public hearing took place to discuss the revision of the Metropolitan Comprehensive Plan. Top of the agenda were the impacts of the mass transit railway and high rise buildings in historic quarters and communities in Bangkok, notably Chinatown. CHeCA was concerned that the land use policy as well as related Bangkok city ordinances did not adequately protect the historic quarters and communities. The Trust, together with its partner organisations, conducted and joined many panel discussions on this matter and publicised the issue through every possible media. It also submitted a petition to the Bangkok Governor.

While the Trust and its partners did not achieve the desired changes in the draft Bangkok Comprehensive Plan, the outcry from CHeCA and other groups prompted the Bangkok Metropolitan Authority to acknowledge that the concerned area needs a different development process and management strategy. The Authority opened more channels for civil society to work with them on the development and conservation of the historic area. It also established a special working committee to propose guidelines and suggestions. However, the Authority's limited budget and too-frequent staff rotation caused a detrimental discontinuity.

The Trust and CHeCA succeeded in increasing public awareness of heritage conservation issues and also mobilised a group of active citizens who are more willing to voice their opinions on urban issues to the authorities and the press. Ongoing seminars and roundtable discussions continue to kindle civic concern.

/ Siam Society, Thailand

The Role of Communications

Underlying all efforts at engagement are communications. Heritage trusts are utilising the possibilities of traditional print media as well as social media to engage with and build their constituencies and deliver their advocacy messages. Larger organisations are likely to employ in-house communications staff while smaller trusts may outsource this function or rely on volunteers. Many have realised that a smart communications effort is essential to achieve their aims of conservation and community engagement. Smart also means continuous and up to date: environmental organisations such as Birdlife International or World Wildlife Fund (WWF) provide good examples. Often communications can be a more acute issue for heritage trusts which manage a small number of sites, such as the US National Trust for Historic Preservation.

Communications: Informative and Social

Thanks to the Honorary PR Office, the National Trust of Guernsey has experienced a massive success in the development of its website and social media presence. This has significantly improved NTG's profile and shown marked results in recruitment of new members and interest in the NTG's activities.

The Grenada National Trust quotes the motto 'We are social' on its website. Among the features of its communications activities are a forum, blog and recent posts with subjects of interest. The website prominently features the mission of the Trust: "Through professional collaboration, fund raising, education, advocacy, public and private sector partnerships and nationwide community involvement we will identify, conserve and promote Grenada's heritage assets for the continual enjoyment of our citizens and visitors".

The Fondo Ambiente Italiano (FAI) has also developed a smart communications strategy which has helped it to raise its visibility throughout Italy. Their Press Office works with the national and local press to promote the recognition of FAI, its objectives and to encourage new members. The office has two sections: Press and Print Media; and Radio and Television. FAI is active on the web, on television and in the press. FAI has built an active social media presence through Facebook, Twitter, YouTube, Flickr, Pinterest, Instagram, and Wikipedia. It has also created a FAI APP (for sale through the App Store) which gives information on its properties and special events. It is also using mobile phone technology as a channel for donations, #FAIcambiareItalia (FAI will change Italy) during the annual FAI Days of Culture (Giornate FAI di Primavera).

/ National Trust of Guernsey, Grenada National Trust and FAI

Indonesia National Trust (BPPI) and Yangon Heritage Trust: Two-Way Communications and Community Engagement

Comprised of more than 100 local organisations as well the international ones, BPPI has developed a strong network through communication. It provides updates on its activities through social media: Facebook, Twitter, Instagram and its own website. Each month it holds a discussion in its office to discuss current issues of heritage conservation. And for widening the communication circle, it holds an annual gathering named Temu Pusaka which is organised in a different city every year.

This communication strategy is based on sharing experiences of best practices to find solutions.

After the opening up of Myanmar in 2011, social media and mobile phone penetration rose from less than 10 percent of the population to more than 80 percent. YHT, as an advocacy group, uses social media platforms to raise awareness on heritage and urban planning issues with a focus on sharing information with the public through social networks. Utilising different forms of social networks such as Facebook and Twitter, it provides information about its work, the city's heritage and history, as well as issues and events. In return, these social networks give YHT the opportunity to engage with mobile users with instant interactions. Moreover, social networks play a vital role in getting connected with friends and supporters from all over the globe.

As a complement to its social media strategy, YHT carried out a community engagement project to reach beyond mobile users. Its staff met up with downtown residents to learn about their understanding of the city's heritage. It also conducts free heritage walking tours for Yangon residents where it gives survey questions to understand their values on local environments.

Through social networks, YHT has received inquiries, historical data, and connections and

PERMATABANK DAN ERASMUS HUIS
MEMPERSEMBAHKAN

PAMERAN FOTO INDONESIAN HERITAGE



Aerli Rasmah, penari topeng Indramayu, Jawa Barat.
Foto: Handika Rizki Rahardwipa/SATBNews.com
Foto poster: Yayasan Tikar Media Budaya Nusantara /Korpas Dendi

KARYA 10 PEWARTA FOTO PENERIMA

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PENGUMUMAN PENERIMA **ERASMUS HUIS** FELLOWSHIP TO **AMSTERDAM**

PEMBUKAAN
JUMAT, 27 MARET
PUKUL 17.00 WIB

PAMERAN
27 MARET – 24 APRIL
SENIN – KAMIS : 09.00 – 16.00 WIB
JUMAT : 09.00 – 14.00 WIB
SABTU : 10.00 – 13.00 WIB

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(+62) 021 524 1069

INFORMASI SELINGKAPNYA
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comments from the public on the city's current situation and issues that locals have faced. Despite its social media presence, it still needs to reach local communities in person so that it can hear the most sincere and important voices from everyone, senior citizens as well.

YHT works very closely with local media on heritage and urban planning issues. It regularly sends out press releases and invitations to its events. Journalists rely on YHT for heritage issues and thus, they always contact YHT for expert opinions in balanced articles. Seeing this as an opportunity for public advocacy that will widen its audience, YHT always takes time to meet the press.

/ Indonesian Heritage Trust (BPPI) and Yangon Heritage Trust

Information technology has also enabled heritage trusts to understand more about their members. The National Trust of England, Wales and Northern Ireland has introduced new systems to help it identify its members' preferences and tailor its communications to talk about what they like. These are techniques that are commonly used by museums and other cultural providers (theatres, opera, concert halls) to analyse the composition of their audiences and friends' groups in order to encourage more frequent or repeat visits, manage visitor numbers, understand spending patterns etc. A new website makes it easier for people to find out about its places and the National Trust cause, including opportunities for volunteering, special events, and campaigns.

A Multi-Faceted Approach

The Trust's current strategy Playing Our Part offers an outstanding example of a comprehensive approach to engagement.²⁵ The strategy emphasises that it 'will offer experiences that move, teach and inspire'. It will do this by:

- Raising the standards of presentation and interpretation at all the places it looks after
- Making outdoor experiences better for all ages and needs
- Innovating the experience people have when visiting
- Exploring and revealing our cultural heritage through events and exhibitions.

Its efforts to improve the experiences people have with the places in its care are based on the concept that they want experiences to be stimulating and rewarding, adapting for new audiences and technology. The National Trust is committed to transforming how they tell the story of why a place mattered in the past and matters now. It is developing an ongoing series of events and exhibitions that help people think differently about history, identity, and the world today. They encourage their properties to be innovative so that something new is revealed on each visit.

Events and Exhibitions – Enlivening Properties by Programming for Families and Children

At Polesden Lacy in Surrey a special exhibit explores the Latin American voyage of the owner and her subsequent introduction of plants from the region. For families, the Trust offers free binoculars to borrow, a playground for children, and a variety of outdoor activities.

At the Killerton estate in Devon, when you visit the house you will step inside and experience one of Killerton's most captivating stories. The Aclands gave away their estate leaving it to the National Trust in 1944 for the benefit and enjoyment of everybody.

At Ightham Mote in Kent, the visitor can see a special exhibition of paintings by John Singer Sargent who stayed in the house and knew its American owners and learn about the circle of writers and artists who gathered there.

/ National Trust of England, Wales and Northern Ireland

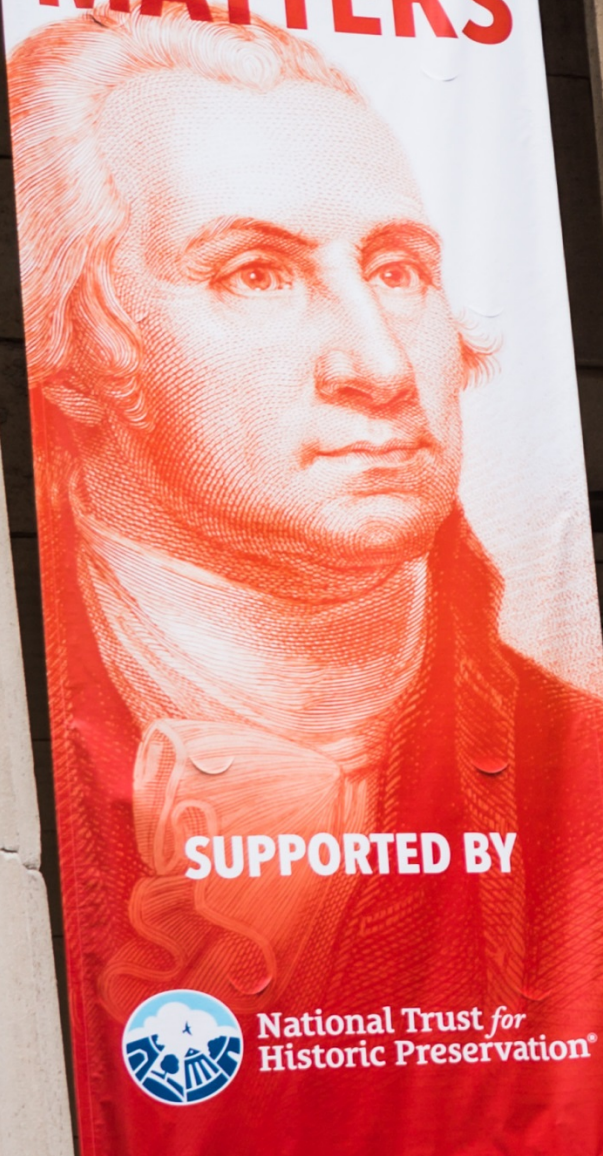
In summary, any public engagement strategy should keep in the forefront of its thinking:

- What does the trust want to achieve through engaging with stakeholders? What is the goal and how will the trust achieve this goal?
- Which stakeholders are critical to success? Do research around who are the key stakeholders and what activity has taken place before.
- How will the trust engage with them? Define an engagement plan that selects what type of communication best suits the need (face to face communication, newsletters, e-bulletins etc.)
- How will it judge if it has achieved its objectives?

Time and again, the success of heritage trusts depends on their ability to meet broader community needs and the role they play in long-term community engagement. The functions of heritage trusts may vary according to the specific context, but ultimately they depend on connecting in a meaningful way with communities to protect and celebrate local heritage. It is not only large heritage trusts that do so. The National Trust for the Cayman Islands, for example, is engaging with civil society to put into action its pledge to protect the future of Cayman's heritage, natural and cultural, through educational programmes for all ages, and historic and environmental programmes.

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PROMOTING RESILIENCE AND SUSTAINABILITY

CHAPTER FIVE

THIS CHAPTER EXPLORES QUESTIONS RELATED TO RESILIENCE AND SUSTAINABILITY. IT INVESTIGATES PROGRAMMES AND OUTREACH, STRATEGIC PLANNING FRAMEWORKS, AND ALLIANCES – WITH CIVIL SOCIETY ORGANISATIONS AND FOUNDATIONS, INDIVIDUAL AND CORPORATE DONORS, BUSINESS, AND MEDIA – THAT CAN INVIGORATE HERITAGE TRUSTS.

The text then examines mechanisms that trusts have developed to achieve financial viability and grow their organisation. The role of evaluation to demonstrate effectiveness is also discussed.

As trusts age, they are often faced with life threatening situations, either related to leadership, finance or relevance. Of course there are different viewpoints. Some believe that resilience is overrated and that sustainability may not be a universal objective if some organisations have a life span that is tied to a specific issue.

Common to many INTO members are the following flash points and corresponding mitigation measures which can help re-energise a heritage trust (see overleaf).

Strategies for Resilience and Sustainability

Mid-life crises are increasingly common among INTO members as the number of trusts to have celebrated 30 year anniversaries (or more) rises. Below are examples of strategies from organisations that have successfully reinvented themselves. Revival through programmes and outreach, strategic planning frameworks, alliances, and business planning are proving to be among the most effective initiatives.

The Barbados National Trust Open House Season: A Volunteer-driven Fund Raiser

Since the late 1960s the Open House Season has been a major feature on Barbados' social events calendar and has provided the opportunity for tens of thousands of Barbadians and tourists to visit some of the most architecturally and socially significant private houses in Barbados.

As well as one of the most important fund raising events for the Trust, the annual Open House Season is also its most significant public outreach and advocacy effort for the conservation of built heritage. Critical to the success of the Open House programme is the total and complete support and involvement of the Trust's volunteers.

Each Open House Season requires the assistance of approximately 20 volunteers including the Open House Co-ordinator who requests home owners and estate agents to open their houses to the public and the Route Planner who plans the visitor path through the property and assigns Room Guardians. Other volunteers oversee tickets; man the drinks, food, books and flower stalls; and manage parking. The presenter of the 'Lively Lecture' who details the history of each property is also a volunteer.

Several of the Trust's staff are deeply involved in the planning and delivery of the annual Open House Season. They oversee meetings with owners and estate agents, manage the budget and finances allotted for the programme and seek out partnership and sponsors.

For the Open House Season 2017, the Trust secured in-kind advertising support from several agencies (Caribbean Broadcasting Corporation, Massy Stores Barbados Ltd). Other advertising assistance came from the Barbados Tourism Product Authority and the Barbados Hotel and Tourism Authority.

Other avenues used by the Trust to promote the season included its website, Facebook page, weekly press releases in Barbados' newspapers and magazine, e-mail blasts and radio appearances as well the Open House brochure. A first for the Open House was the inclusion of door prizes for patrons during the 2017 Season donated by sponsors and supporters.

Traditionally the Open House Season is hosted every Wednesday however the Trust made the decision this season to host one Open House per month on a Saturday in an effort to accommodate more visitors.

/ Barbados National Trust

National Trust for Canada: New Programmes, New Energy

The National Trust for Canada has launched a raft of new programmes with the aim of achieving its mission of leading and inspiring action for places that matter and fulfilling its role as an essential source of services, tools, inspiration and funding for heritage places. They include:

The annual This Place Matters is a competition for communities to submit ideas for revitalisation of main streets with a prize pool for \$250,000 and prizes in regions across the country. A crowdfunding webinar was held in 2017.

Regeneration Works is a one stop shop for tools, training and coaching to help Canadians improve the vitality of heritage places, whether downtown revitalisation, regeneration of heritage sites and buildings or fundraising.

Main Street Boost is an event designed to spark the revitalisation process in communities. The National Trust works with communities to develop the potential of downtown. It complements the Main Street Regeneration Program.

Top 10 Endangered Places is an annual programme that brings attention to historic places at risk. Nominations shine a national spotlight on places in danger.

Launch Pad, made possible by support of Trust donors and the national network of volunteers, brings together key local players with seasoned experts to collaboratively find solutions to save and renew historic places. Launch Pad missions are focused on interventions to bring targeted expertise to a heritage project.

Young Canada Works is responsible for the creation of student jobs and internship positions in historic research, heritage site interpretation, Doors Open events and other building careers in heritage. 'Locale' is the National Trust magazine, with a new look and name.

/ National Trust of Canada

²⁶ http://www.nationaltrustcanada.ca/sites/www.nationaltrustcanada.ca/files/Communications_Annual%20Report_2015-2016_FINAL.pdf

Towards Resilience and Sustainability

FLASHPOINTS

- Founding champion(s) are no longer willing or able to lead

- Reliance on one or a few funding sources

- Failure to attract new members and supporters

- Loss of 'market share' – to other organisations

- Financial difficulties with an imbalance of costs and income

- Funding provided for special projects but not for operational costs

- Weak or intermittent communications

- Unconvincing resonance of the organisation

- Board has hands-off attitude

- Membership seen as low benefit

- Insufficient staffing

- Organisation is static

- Problems with the regulatory environment

- Problems with Government

MITIGATION MEASURES

- Devise a succession plan for leadership

- Diversify funding pool (private sector, charitable foundations, government, development agencies), including possible crowdfunding

- Analyse make up of current membership and ways to expand it

- Explore cooperation with other organisations or a form of umbrella organisation

- Develop a realistic business plan with the help of business minded staff including consideration of endowments for properties or projects – and longer term maintenance needs for properties

- Work hard to find donors who will support core funding while developing revenue generating activities

- Prepare a communications strategy that identifies audience (current and potential), uses social media effectively, and updates press releases on a regular basis

- Refine and reshape messages and programmes

- Work with board to encourage their participation and fundraising

- Compare membership with other organisations and investigate ways to increase benefits, shift to 'supporter' model

- Analyse current staffing and skills and devise a plan to cover functional needs

- Develop a strategic plan that presses for innovation

- Understand the points of disagreement, explain trust's position to regulators, and attempt to find common ground

- Make efforts to understand the point of view of Government, draft position papers or explanatory statements, and continue to encourage dialogue to iron out differences

The National Trust of Slovakia at 20 Years – Diversifying its Activities

To mark its 20th anniversary, The National Trust of Slovakia held a conference in Bratislava in 2016, supported by the European Union, on the theme 'Who owns the monuments'. Speakers from Slovakia and abroad gave presentations on co-operation between government and heritage NGOs in Slovakia, trends in heritage protection in Bratislava, the grant scheme 'Let's repair our house', promotion of forgotten places in Slovakia (Black Holes project) and comments on the future of the National Trusts of Slovakia.

It continues to cooperate with national level government bodies, local government, NGOs, universities and owners of historic places. The Trust's consulting service advises on project preparation, adaptive reuse of properties, techniques of conservation, and site management; training and seminars; guide services in Bratislava and in the Liptov region; and publications such as guidebooks and postcards.

/ National Trust of Slovakia

Strategic Frameworks

Strategic planning is an important tool to help trusts weather periods of stress. Among the trusts which have carried out major strategic planning exercises are FAI, the National Trust of Scotland, Trustees for the Reservation, the National Trust of Australia (Victoria), Heritage New Zealand, and the Yangon Heritage Trust. These exercises focus on increasing awareness and interest in the trust's mission and activities, looking after visitors, rethinking property management, and strengthening finances. FAI offers a positive example of developing multi-year planning.

FAI's Planning Framework

FAI is developing its next three-year plan which will focus primarily on new properties: the acquisition strategy as well as their management. Today FAI manages 56 properties across Italy, of which 34 are open to the public on a regular basis, 6 are under restoration, and 16 are protected. The goal is to have one property in each of the 20 Italian Regions; at present the properties are concentrated in northern Italy with a major property in Rome. Challenging goals are being set for other functions as well: Membership, Fundraising and Volunteers which are all important topics for the upcoming years.

Concurrently FAI is reorganising the structure which manages the properties, developing new roles for staff in this specific area, and creating leadership at various levels. Visitor services and experience are also priorities which will add to the level of excellence it has reached in the architectural and artistic restoration of properties, both for those which are assets of the Foundation as well as properties which have been granted on a concessional basis to FAI by national and local authorities.

Comparing and studying best – and worst – practices is a very useful way to learn and develop FAI as an organisation. In this regard two visits by staff from the National Trust of England, Wales and Northern Ireland have been decisive. In 2013, an NT manager assessed the organisation's underlying successes and excellence in many areas. Among other things, she urged FAI to love people as much as it loved properties and advised it to concentrate on developing a 10 year-strategic plan which will take it to 2023. After almost 40 years since the birth of the organisation, this entailed the rewording of its mission and refining the definition of its vision. FAI was in fact ready for that and it was the appropriate moment to embark on such a challenging project.

Subsequent staff visits to National Trust's properties and headquarters and participation at the 2015 INTO conference were also stepping stones for colleagues in order to fine tune their work. A recent visit by another National Trust manager gave invaluable insights and practical suggestions which helped FAI assess its properties' structure and regional organisation in view of anticipated change.

/ Fondo Ambiente Italiano



National Trust of Scotland: In for the Future

The National Trust of Scotland carried out a full review of its finances and organisation, 'In for the Future,' which it completed in 2016. This change programme has involved considerable rethinking of roles and responsibilities, including the creation of a Chief Operating Officer position and regional business units that will bring properties together with supporting services and specialist expertise.²⁷

In the year 2016 new activities focused on partnerships, education, and conservation. At Drum Castle an innovative partnership arising from the redevelopment of the Aberdeen Art Gallery opened a new gallery space; a new property was acquired; school educational programmes were held; historic photos and letters were digitalised; appeals and advocacy campaigns were launched; and the negative impacts of climate change on pathogens and extreme weather incidents were experienced.

/ National Trust for Scotland

Alliances – Working with Others to Find Solutions

In an increasingly competitive and interconnected world, most heritage trusts have recognised the value – and need – for working collaboratively.

Why Working Together Makes Sense

“We face many challenges in the years ahead, and big questions in the historic and natural environment, but we can’t tackle them alone. Our strategy will see us working more collaboratively with a range of partners to explore new approaches and find solutions....”

For example, the National Trust of England, Wales and Northern Ireland plays a leading role in Heritage Open Days. It attracts more than 3 million visitors at over 4,500 events (2014). This is a way in which it forges new partnerships that helps it deliver even more engaging and relevant experiences.

/ National Trust of England, Wales and Northern Ireland

Alliances Across Government, and the Private and Voluntary Sectors

The National Trust of Jersey is well aware that differences of opinion regarding the long term interests of heritage assets can result in strained relationships between a trust and government. It is not always easy to balance the needs for a vibrant economy, whilst still safeguarding and conserving the natural beauty, which ourselves and our ancestors have been privileged to enjoy. For the sake of future generations, however, there is a duty upon us all to try and do so, and indeed work with our partners in finding sustainable and imaginative solutions to these difficult challenges.

The Island of Jersey struggles to accommodate a growing population of 110,000 people within a mere 45 square miles. Despite its relative economic success the island suffers from increasing urbanisation, habitat fragmentation, degradation of its marine environment and the loss of such iconic birds as the Cuckoo.

When facing such immense environmental challenges, the National Trust of Jersey has found that the solutions are to be found in strong, long term and equal partnerships, whether with Government, NGOs or corporate supporters. Recently it managed to safeguard through purchase 10 acres of coastline by working with Government; it successfully worked with Durrell and the Department of the Environment to re-introduce the Chough; it delivered an education programme for over 1,500 children with the assistance of HSBC, and has safeguarded three historic buildings in partnership with the Channel Island Co-operative Society.

These relationships are not always easy as each party may have a different agenda. For example the Channel Islands Co-operative Society initially wished to demolish the historic buildings that the Trust

²⁷ http://www.nts.org.uk/Downloads/Site/Transforming_the_Trust_Handout_January_2016.pdf

campaigned to save. Also it took a demonstration of 7,000 people to form a Line in the Sand for our Government to realise that the general public supported the permanent protection of the coastline. However, with good dialogue, mutual respect, persistence, and a large dose of patience, it has found that solutions can be secured which are in the best long term interests of Jersey.

As a National Trust it has not hesitated to voice its opinion because it has a duty to do so under its legal constitution to seek to protect the natural beauty and historic interest of the Island. Without doubt this sometimes causes umbrage, but ultimately people appreciate and recognise that having a voice is part of the National Trust of Jersey's role as a conservation organisation. Failing to campaign to save the coastline, its ecology and historic buildings would ultimately be failing its members, benefactors, founders and above all future generations. For ever and for everyone underlies everything it does.

/ National Trust of Jersey

As shown in the Jersey example, there are various types of alliances: with civil society organisations; with donors including private individuals; with businesses; and with media.

- **Other civil society organisations and foundations**

Probably the most common form of alliance is with other locally based civil society organisations with a conservation objective. The eight state level Australian National Trusts have each developed working relationships with civil society organisations, frequently environmental organisations. The Heritage Alliance²⁸ in England has made a major contribution to the overall heritage sector by providing a voice for independent heritage organisations – now with over 100 members – while Europa Nostra has played a similar role in Europe.²⁹ The Prince Claus Fund, the Global Heritage Fund, the Headley Trust, the British Council, as well as UNESCO are among prominent international heritage institutions that provide various types of support. The World Monuments Fund Watch presents another example of civil society organisations joining forces to promote awareness and care of heritage places.³⁰

The UK Heritage Alliance and European Heritage Alliance 3.3: Promoting the Role of the Independent Heritage Sector

The Heritage Alliance is England's biggest coalition of heritage interests. It unites over 100 independent heritage organisations, acting as a powerful, effective and independent advocate for the movement. Established in 2002 as Heritage Link with support from the National Trust of England, Wales and Northern Ireland, it gives a voice to large organisations as well as more specialist bodies representing visitors, owners, volunteers, professional practitioners, funders and educationalists – some 6.3 million people in all.

It aims to advocate by identifying the overarching messages from members, share members' experience and expertise to influence policy and legislation, and build capacity among the heritage sector to champion and engage with heritage.

Among its activities are to respond to Government policy, provide training opportunities (for example for fundraisers), organise advisory groups (Spatial Planning, Rural Heritage, Funding, Inclusion and Learning, and Historic Religious Buildings), and publish a Heritage Funding Directory. It also holds events including the annual Heritage Day.

The European Heritage Alliance 3.3, an informal platform of 40 heritage-related European and international networks, brings together civil society, historic cities and villages, educational institutions, museums. It was founded in 2011 and receives support from the EU.

²⁸ <http://www.theheritagealliance.org.uk/>

²⁹ <http://europeanheritagealliance.eu/>

³⁰ <https://www.wmf.org/>

World Monuments Fund Watch – and the Role of INTO Members

Every two years at risk heritage sites are selected for the WMF Watch through a nomination process that assesses the site significance, urgency of the conditions or opportunities for change, and project viability. Launched in 1996, the Watch has served as a catalyst for action for hundreds of sites, leading to improved conservation, more suitable tourism management and increased community involvement.

INTO members have been active in bringing attention to sites at risk. Among the Watch sites are: Desa Lingga, Sumatra, Indonesia (2012); Bunce Island, Sierra Leone (2016); Yangon, Myanmar (2015 conference); and Bucharest, Romania (2016).

Typically sites receive additional new funding in support of their conservation work as well as increased visibility and public awareness. The World Monument Watch is sponsored by American Express.

Heritage trusts such as the Sumatra Heritage Trust, Pro Patrimonio, and the Yangon Heritage Trust and other local advocacy organisations are instrumental in the Watch process. They also organise Watch Day events aimed at engaging communities. Watch Day events and celebrations can offer public debates about heritage issues, film screenings etc.

- **With donors – individual or corporate**

There are countless examples of the contribution of donors to the work of heritage trusts. The contribution may be in the form of expertise, influence or financing. Almost all heritage trusts benefit from the largesse of donors. Board members are often key benefactors. An interesting subset of INTO members, some of which are in former Eastern Bloc countries, have set up parallel organisations for ex-patriate supporters.

Board Contributors

The US National Trust for Historic Preservation (NTHP) benefits from the support of an active Board. These Board members come from around the country and represent a variety of professional backgrounds from lawyers to property developers to community leaders and historians.

The Board is expected to contribute expertise, extend the circle of influence of the Trust, and provide financial support.

Many of the Board members began with an involvement in historic preservation issues at the local level and were attracted to the larger national canvas of the NTHP. They are especially proud of the Main Street Program developed over the last 33 years which has helped breathe life into dying small towns throughout the US. They are also an important source of advice – the eyes and ears of the Trust.

/ National Trust for Historic Preservation, USA

Ex Patriate Supporters of National Trusts

Several INTO members have developed parallel organisation for ex-patriate supporters.

Possibly the oldest such effort is the Royal Oak Foundation which seeks to raise awareness of and advance the work of the National Trust of England, Wales and Northern Ireland among US supporters. Its members enjoy access to Trust properties as well as programmes and activities in the US ranging from lectures, special tours, to special events. In addition to raising substantial sums of money for the Trust it also sponsors fellowships and scholarships for American students and researchers. A similar arrangement exists between the National Trust for Scotland and the US based National Trust for Scotland Foundation USA.

- **With businesses**

Heritage trusts have recognised the value of working with businesses to advance their own objectives. In some cases firms finance specific programmes that match their social responsibility aims, in others they may provide equipment or in kind support.

Business Links Supporting Trust Social Aims

A good number of heritage trusts have been able to attract corporate support. They may be financial institutions such as banks, family businesses or other types of business. Among heritage trusts who have secured support from multi-nationals are Pro Patrimonio which has gained sponsorship from Lafarge Holcim and Holver and Europa Nostra which counts Pictet and Bertelsmann as main partners.

REMPART has benefited from the support of the TOTAL Foundation and the Hermès Foundation on a youth inclusion programme, Action Heritage Inclusion, for youth from disadvantaged areas. REMPART also has the support of companies who want to develop their corporate social responsibility. Since 2014, the British company Silverline has offered tools to equip several REMPART work camps.³¹

Some of the businesses are local artisanal producers, such as the northern Italian makers of slippers, Furlane, which have been featured at FAI's properties in the Veneto area or the Indian Rural Heritage and Development Trust's Azamgarh crafts producers. Others rely on local food producers to stock their catering operations.

- **With media**

Good contacts with the media are a hallmark of a number of heritage trusts and have helped them achieve international and national recognition and support – whether spreading their advocacy messages or leading to financing. Many heritage trusts have a section on news or media as part of their websites as a way to keep supporters informed about media coverage.

This page can include press releases, interviews, newsletters or other newsworthy posts. Managing media relations is generally the responsibility of an external affairs, communications, or public information officer. Some organisations also have a website and social media position.

Media Relations: Creating a Voice for Civil Society in Heritage Conservation

Europa Nostra is very adept at being in the news. It uses the media to advance its campaigns (such as 7 Most Endangered), its overall Mainstreaming Heritage networking project, and the cause of heritage conservation in Europe. Frequent press releases are a feature of its media strategy which works at the pan-European as well as national level.

The Yangon Heritage Trust has been particularly successful in gaining notice from the international press, namely *The Economist*, *Financial Times*, *International New York Times*, *BBC*, *AFP*, *The Guardian*, as well as Asian regional press including *Nikkei Asian Review*, *Southeast Asia Globe*, *TTR Weekly*, *ASEAN Travel*, and *the Times of India*.

This coverage has helped them win support from international development agencies and international foundations. The local media, another important avenue, includes *The Myanmar Times*, *Frontier Myanmar*, *The Irrawaddy*, and *Mizzima*.

³¹ <http://www.rempart.com/n/mecenes/n:119723>

Financial Matters and Business Plans

Financial management is an inescapable challenge for all heritage trusts and there is no simple formula to achieve a sound financial footing. The discipline of Annual Reports and audits is one tool to keep the organisation's eye on the prize of sustainability. Employing competent staff and diversifying the base for financial support are standard – and sensible – strategies. Donors, including government, can be unpredictable and should not be counted on 'forever'. Moreover, fiscal regimes change and trusts must be nimble in order to take advantage of any tax breaks (property tax credits for conservation works, VAT allowances etc.) and avoid holes in budgets when changes are not beneficial. Major weather events or simply age can hasten the need for new roofs or other costly maintenance work. In some cases it may be advisable for a heritage trust to bring in a specialist fundraiser or development officer to maximise the possibility of raising financial and other forms of support.

The National Trust of Scotland is not alone in facing the major risk of financial sustainability. Difficulty in meeting its objectives of balancing costs and income over time and having insufficient finances to meet the conservation needs of the property portfolio led to a deterioration in the condition of its estate. Costs and commitments had continued to increase while income from paying visitors, government and other sources either fell or failed to match the levels of costs. After a full review of its organisation and finance, it has embarked on a restructuring and reorganisation of the Trust's operations, the 'In for the Future' change programme, to improve its operating efficiency.

There are many guides to business plans for heritage. Among the most useful are the Heritage Lottery Fund's guides for business planning³².

Growing Resources

In order to achieve objectives, most heritage trusts will need to grow their resources. This may mean supplementing their core funding, increasing their paid staff, expanding their volunteer base, or extending their range of activities. Some organisations are able to do this quite rapidly through a fortunate set of circumstances that attracts sponsorship, talented staff, and public interest. Others may be involved in a slower, incremental process. Champions that can draw upon a circle of generous or influential donors is one pathway.

Another is the ability to tap into funds from multilateral or bilateral development agencies or international heritage institutions. These opportunities can be linked to country assistance strategies; in some instances donors allocate funds for civil society organisations, or environmental programmes. Many firms have corporate social responsibility programmes, for example energy companies, banks, and multinational companies, which may offer a window to support a heritage trust. The support could be financial or in kind such as expertise or materials. Learning how other civil society organisations grow is another source of ideas; environmental organisations such as World Wildlife Fund and the Nature Conservancy have been particularly successful in achieving a lasting presence.

A newer source of support is through social enterprises and crowdfunding, such as Yunus Social Business, Khiva, or the Omidyar Network, all of which invest in social entrepreneurs. This is a rapidly changing field with a stream of new entrants. Heritage trusts will need to demonstrate their social credentials to attract support.

With many important issues to address, it can be difficult for smaller heritage trusts to carry out their activities because of lack of resources. Creative thinking – and some patience – are called for to surmount these challenges. It is reassuring to remember that after 40 years of existence, one heritage trust had only six staff – two of whom were unqualified! This organisation has gone on to become the world's largest conservation organisation.

³² <https://www.hlf.org.uk/project-business-plan-guidance>
<https://intoorg.org/knowledge-base/creating-a-fundraising-plan>
<https://intoorg.org/knowledge-base/fundraising-basics-for-preservation-organisations>

Demonstrating Effectiveness

For supporters and donors, robust data that demonstrates effectiveness is an essential tool to help weather mid-life crises. By developing an evidence base for the outcomes of their work, heritage trusts can make the case for their worth.

Monitoring and Evaluation: Some Trust Examples

Heritage New Zealand has developed an outcome based approach to understanding its performance. With three main outcomes – knowledge, conservation, and engagement – it examines related long-term impact indicators and priority outputs. Outputs are quantified by means of performance measures.³³

For FAI the current three-year operational plan 2015-2017, which focuses on New Targets, has in-depth monitoring and evaluation measures which have been set up from the start. Qualitative and quantitative Key Performance Indicators have been set for each topic of the areas of work: so far they are on track and for many items much ahead of the expected results.

The National Trust of Scotland also uses a set of Key Performance Indicators to track its impacts. These include: Number of members at year's end; total visitors to properties; paying visitors to properties; conservation project expenditure; new conservation plans completed; percent of properties operating at budget; gross fundraising income; staff training days per full time staff; incidents of injuries or dangerous occurrences.

Some Practical Guidance on Resilience and Sustainability

ACTION

OUTCOME

- | | |
|---|--|
| • Offer a programme of activities that interests existing supporters and attracts new adherents, for example family events, traineeships for young adults or recreational opportunities | • Individual supporter base is strengthened |
| • Try out new initiatives that may produce new income streams such as catering using locally produced food, rentals for corporate events, holiday cottages etc. | • Financial position is improved |
| • Utilise a strategic planning exercise to forecast shorter term objectives and results | • Heritage trust is focused on identified objectives and recognises how they can be achieved |
| • Develop alliances that promote the effectiveness of the heritage trust, whether with other civil society organisations, businesses or media | • Support is gained that will deepen the impact of the heritage trust |
| • Nurture relationships with the media to spread the word about the heritage trust and its achievements | • Visibility of the heritage trust is increased |
| • Cast a wide net in seeking funders – not only the usual suspects | • The heritage trust has a wider support base that may reduce risk of dependence on only a few funders |
| • Explore social enterprise and crowdfunding for potential funding | • New sources of funding are tapped – social enterprises and crowdfunding are rapidly growing areas of support for social investment that may be relevant for some heritage trusts |
| • Make an evaluation of the trust's operation by developing a solid evidence base of its relevance and effectiveness | • The value of the heritage trust and its activities can be demonstrated |

³³ <http://www.heritage.org.nz/resources/-/media/3874422394184144bb47bd1d8803431c.ashx>

EVD

" They don't
understand us
people

[illegible]

CONCLUSIONS AND LOOKING AHEAD

CHAPTER SIX

THE FINAL CHAPTER PRESENTS CONCLUSIONS ABOUT THE POTENTIAL OF HERITAGE TRUSTS IN THE 21ST CENTURY AND HIGHLIGHTS SOME EMERGING OPPORTUNITIES.

Conclusions

What is the potential of heritage trusts in the 21st century?

- **A Healthier World:** By providing access to historic, beautiful and natural places heritage trusts can offer healthy opportunities for recreation and enjoyment.
- **Civic Engagement:** They can promote constructive public dialogues, discussion and debate.
- **Recognition:** Through their education and public awareness activities, they can increase the recognition of the value of cultural and natural heritage and cultural diversity.
- **Opportunities:** They offer opportunities to experience and enjoy heritage places, which for young people can set a lifetime model.
- **Skills:** By aiming at high standards of conservation and visitor services, they contribute to a skilled workforce.
- **Promotion of Regional or National Identity:** Especially in post-conflict countries, they can mark a new era of democracy and national identity.
- **Accountability:** They can call to account government and private sector interests which may think harder about actions that are harmful to the historic environment.

Heritage trusts are able to respond to many unmet needs in society as they work for heritage conservation and community cohesion.

‘Arms Open’ Conservation

Inspired by the US National Park Service, in the early 2000s the National Trust of England, Wales and Northern Ireland set about to make people feel involved, enthralled and engaged in the spirit of place, and not be simply passive observers of it. This could only be possible by enabling people to feel more at home, more welcome and less inhibited by rules and regulations. It wanted its supporters to see conservation work in action and feel part of the Trust’s great and inspiring cause.

/ Fiona Reynolds, The Fight for Beauty: Our Path to a Better Future, 2017

New Trends in the Last Decade

As the preceding chapters have shown, heritage trusts operate in many countries and regions, under different conditions. Nevertheless it is possible to make some observations about new trends in the last decade that can offer important opportunities and insights.

- **Emerging and Post-Conflict Nations**

Changing political landscapes can prompt the creation of new civil society organisations, including heritage trusts. Among these post conflict countries are Myanmar, Romania, and Sierra Leone. Lebanon, Albania, and Georgia each have nascent civil society groups working on the idea of a heritage trust. Development assistance from multilateral and bilateral agencies may provide opportunities for support to such organisations.

- **Urban Heritage**

The dramatic growth of cities has given rise to heritage trusts operating at an urban scale. A sense of civic pride and desire to have a say in the future of cities and towns have prompted the creation of the Yangon Heritage Trust, the Zanzibar Stone Town Heritage Society, and the Penang Heritage Trust. The National Trust for Historic Preservation's Main Street Program has breathed new life into many towns in the US and has inspired the work of other trusts. Its ReUrbanism initiative takes a step further, seeking to build the successful, inclusive, and resilient cities of tomorrow.³⁴

Other organisations are also recognising the need to address urban issues and connect with urban dwellers. The Trustees of Reservations, the National Trust for England, Wales and Northern Ireland, and the Indonesia Heritage Trust (BPPI) have active outreach activities.

Trustees of Reservations and the National Trust London: Urban Programmes

The Massachusetts (US) based Trustees of Reservations, in carrying out its mission to preserve, for public use and enjoyment, properties of exceptional scenic, historic and ecological value in Massachusetts, has expanded its presence in Boston and other urban centres to reach new audiences. It operates the KITCHEN, a demonstration kitchen that serves as a community teaching, learning and gallery place at the Boston Public Market, and supports community gardens throughout the city where residents work together to create oases of green and produce healthy food. The Youth Conservation Corp offers educational opportunities and high quality jobs for a wide range of conservation pursuits. The Master Urban Gardener course helps novice and experienced gardeners build their skills. The Trustees also engage in advocacy for urban parks.

The National Trust's work in London is all about championing beauty, heritage, and nature in this world city. Recognising that Londoners are not your traditional National Trust visitor and are younger and more diverse, the Trust grows support by offering innovative, thought provoking, experience-led programmes. Initiatives focus on promoting and protecting local heritage, and/or issues of contemporary and future heritage in the city.

Edge City: Croydon was a celebration of post war politics, place-making and pride. The project explored the contemporary heritage of Croydon and cast a spotlight on the borough as one of the most important examples of the post-war ambition to build a new society. Through offering members of the public a chance to join time-limited tours or events, the Trust sought to spark a debate about what is special and cherished about suburban places like Croydon, which are as awash with heritage, green space and beauty as anywhere else.

Queer City: London club culture 1918 – 1967 was an exploration of queer life before the Sexual Offences Act of 1967. As part of the nation's commemoration to mark 50 years since the partial decriminalisation of homosexuality, the Trust partnered with The National Archives to re-create The Caravan, 'London's most bohemian rendezvous', a queer-friendly members club of 1934. As well as offering members of the public tours of the Soho area, the Trust offered a themed programme of talks, debates and performances which explored queer heritage in Soho and the threat to queer club culture in London.

/ Trustees of Reservations and the National Trust London

³⁴ <https://savingplaces.org/reurbanism>

BPPI and the Heritage Cities

In addition to its strong working relationships with other community organisations, BPPI has developed partnerships with local government of heritage cities in Indonesia to build their capacity for heritage inventories, heritage management, and spatial design. BPPI also facilitates cities in Indonesia to become members of the Organisation of World Heritage Cities and assists them in preparation for the acknowledgement as World Heritage Cities by UNESCO.

/ BPPI Indonesian Heritage Trust

ReUrbanism

We all have places that matter to us – places that define us, places that challenge us, places that bring us together and tell our story. These places help form our identity and our communities. They create opportunities for growth and help us feel at home. They explain our past and serve as the foundation of our future. But when older buildings are destroyed, the engine that keeps neighbourhoods growing, innovating, and thriving is disrupted. Fundamental to ReUrbanism is that building reuse encourages economic growth and stimulates vibrant communities.

As part of its ReUrbanism initiative, the National Trust for Historic Preservation has produced interactive maps which chart the age and character of cities across the United States. The Atlas of ReUrbanism³⁵ is a tool to help urban leaders and advocates better understand and leverage the opportunities that exist in American cities. It makes accessible data already available to allow for the exploration and discovery of connections between older buildings and economic, demographic, and environmental outcomes.

/ National Trust for Historic Preservation

Meanwhile other trusts are focusing on rural issues, namely the Indian Trust for Rural Heritage and Development and the Canadian National Trust for Land and Heritage

- **Focus on the Visitor Experience**

As the visiting public becomes more discerning, heritage trusts have had to take a hard look at their visitor services in order to remain competitive. Many are focusing attention on telling the story of a place and using staff, volunteers and IT in creative ways to engage visitors. FAI, the National Trust of Barbados, and the National Trust of the Cayman Islands, among others, are experimenting with new visitor friendly approaches at their properties. The National Trust of Scotland is currently undergoing major changes, resulting in transformations at its properties thanks to significant investment.

- **Devolving Activities and Expertise to the Local Level**

Several larger trusts have begun a process of devolving responsibilities and authority to property managers. The National Trust of Scotland, for example, is currently decentralising activities and expertise to local communities. In England, Wales and Northern Ireland the National Trust has also given more power to property managers to take decisions and set priorities.

- **Raising an Alarm about Climate Change**

Heritage trusts, especially on small islands such as the National Trust for the Cayman Islands, are imperilled by climate change. Several of these have mounted advocacy campaigns to raise awareness of the negative impacts of changing environmental conditions on built and natural heritage. The National Trusts of Scotland and England, Wales and Northern Ireland are among trusts that are demonstrating the costs of storm events, drought and other extreme weather occurrences at their properties.

³⁵ <http://forum.savingplaces.org/act/pgl/atlas>

Meeting Challenges

There are many challenges for trusts in the 21st century. Attracting younger members, advocating for inclusivity, managing tourism, and facing competition are a few of the most pressing.

• Attracting Younger Members

Children and family programmes are a means to attract younger visitors. In England, Wales and Northern Ireland the National Trust's '50 Things to Do before you are 11 $\frac{3}{4}$ ' is an excellent example.³⁶ The National Trust of Bermuda also runs a variety of children's activities. Many trusts are faced with an ageing membership and drop in volunteers that may test their sustainability.

• Designing Membership Packages

The sustainability of a heritage trust depends in most cases on its members. They want to feel that the financial contribution brings them adequate benefit, apart from feeling good. Well designed and meaningful member benefits are vital to the viability of a trust. There are many types of benefit, from privileged access to heritage sites, to educational programmes to social events.

• Advocating for Inclusivity

Inclusivity, especially in regard to Aboriginal and other native groups, has come to the forefront in the last decades. The National Trust of Australia Victoria (Reconciliation Plan), the National Trust of Grenada, and Heritage New Zealand have all developed policies and programmes that acknowledge and promote inclusive communities. Other trusts have recognised the importance of supporters of all ages – young families as well as older supporters.

• Managing Tourism

Managing tourist numbers in a way that is appropriate to sites requires an understanding of how the site is being used and what is its carrying capacity.

As tourism numbers continue to swell, many sites – especially the better known – can become the victims of their success. This is especially acute in the case of large tour groups as is common in Asian sites such as Angkor Wat. An extensive literature is devoted to visitor management.³⁷

Among the effective strategies to cope with crowds are:

- Timed entrances
- Restrictions on length of time allowed for a visit at the site
- Accompanied visits only, by a site guide
- Circuits which spread out impact throughout a site
- A site museum or visitor centre providing detailed information on the site and its context
- Green transport to reach the site and prohibition of private vehicles
- Rest periods when the site is not open to the public
- Efforts to promote secondary sites
- In special cases, a virtual reconstruction of a site (especially for cave paintings)

Increasing Competitiveness in the Face of Donor Selectivity

Competition means that heritage trusts need to position themselves so that they are attractive to donors. In many instances professional fund raisers or development officers will be needed. The Trustees of Reservations has a well-staffed development office to manage its fundraising yet its motto is that everyone is a fundraiser.

³⁶ <https://www.nationaltrust.org.uk/50-things-to-do>

³⁷ <https://intoorg.org/encyclopedia/busy-doing-well>

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Checklist for Heritage Trusts: Questions to consider when embarking on a heritage trust

SOME KEY QUESTIONS TO CONSIDER IN THE INITIAL STAGES OF DISCUSSION INCLUDE:

- **Goals:** What is the goal of the heritage trust? Will it promote civic engagement? Will it have an education component?
- **Timing and Sequencing:** Are stakeholders ready to participate? Is the wider public ready – and willing - to engage in the issues that the heritage trust raises? How does the proposed trust relate to other conservation initiatives?
- **Initiators:** Who are the initiators of the project? Do they have enough legitimacy and standing in the community to embark about such an organisation?
- **Stakeholders:** Who are the key stakeholders of the trust? Have stakeholders been consulted about plans for the trust? How will they be included in the operation of the trust?
- **Resources:** What are the various resources – human and financial - available for the trust?
- **Public Awareness:** Will it undertake public campaigns to raise awareness about the trust? If it is national trust, what kinds of awareness raising
- **Research:** What sort of research will be undertaken and how will it be used to inform the conservation process?
- **Developing links:** Does the organisation inform or talk to other similar organisations?
- **Longer term vision:** What is the long-term vision for the trust? How will it ensure that the trust meets the evolving needs of the stakeholders and wider public? Are there specific activities that will be undertaken to ensure ongoing public engagement?

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Alliances for outreach

- Heritage Alliance <http://www.theheritagealliance.org.uk/>

Education programmes

- Heritage Education Toolkit, Cross-Cultural Foundation of Uganda <https://intoorg.org/knowledge-base/the-heritage-education-tool-kit-for-heritage-clubs-in-ugandas-secondary-schools>
- Trust Kids, International National Trusts Organisation <http://intoorg.org/trust-kids>

Advocacy and communications

- Working with an Advocacy Coalition, National Trust for Historic Preservation <https://intoorg.org/knowledge-base/working-with-an-advocacy-coalition>
- Rescuing Historic Resources: How to respond to a preservation emergency, National Trust for Historic Preservation <https://intoorg.org/knowledge-base/rescuing-historic-resources-how-to-respond-to-a-preservation-emergency>

Strategic frameworks

- National Trust, Playing our Part <https://www.nationaltrust.org.uk/documents/national-trust-playing-our-part.pdf>
- Australian Heritage Strategy Development (Australian Council of National Trusts) <https://intoorg.org/knowledge-base/australian-heritage-strategy-development>

Financial matters and business plans

- Planning to Succeed: Preparing a Business Plan for Your Nonprofit Organization, National Trust for Historic Preservation <https://intoorg.org/knowledge-base/planning-to-succeed-preparing-a-business-plan>
- Fundraising Basics for Preservation Organisations, National Trust for Historic Preservation <https://intoorg.org/knowledge-base/fundraising-basics-for-preservation-organisations>
- Creating a Fundraising Plan, National Trust for Historic Preservation <https://intoorg.org/knowledge-base/creating-a-fundraising-plan>
- Business Plan Guidance, Heritage Lottery Fund <https://www.hlf.org.uk/project-business-plan-guidance>
- Financial Measures to Encourage Heritage Development <https://intoorg.org/wp-content/uploads/2015/09/Financial-Measures-to-encourage-heritage-development.pdf>
- Heritage Counts, the annual audit of England's heritage <https://historicengland.org.uk/research/heritage-counts/>

INTO Members (September 2017)

Australian Council of National Trusts	http://www.nationaltrust.org.au
National Trust of Australia (Australian Capital Territory)	http://www.nationaltrust.org.au/act
National Trust of Australia (New South Wales)	https://www.nationaltrust.org.au/nsw
National Trust of Australia (Northern Territory)	https://www.nationaltrust.org.au/nt
National Trust of Australia (Queensland)	https://www.nationaltrust.org.au/qld
National Trust of Australia (Tasmania)	https://www.nationaltrust.org.au/tas
National Trust of Australia (Victoria)	https://www.nationaltrust.org.au/vic
National Trust of South Australia	http://www.nationaltrust.org.au/sa
National Trust of Western Australia	https://www.nationaltrust.org.au/wa
Bodenfreiheit – Verein zur Erhaltung von Freiräumen	http://www.bodenfreiheit.at
Barbados National Trust	http://www.Barbadosnationaltrust.org
Herita (Belgium)	http://www.herita.be
Bermuda National Trust	http://www.bnt.bm
Yangon Heritage Trust	http://www.yangonheritagetrust.org
National Trust for Land and Culture (B.C.) Society	http://www.ntlcbc.ca
National Trust for Canada /Canada - La Fiducie Nationale	http://www.nationaltrustcanada.ca
La Fundació Catalunya-La Pedrera (Spain)	http://www.fundaciocatalunya-lapedrera.com
National Trust for the Cayman Islands	http://www.nationaltrust.org.ky
Ruan Yisan Heritage Foundation (China)	http://www.ryshf.org
Czech National Trust o.p.s.	http://www.czechnationaltrust.org
Friends of Czech Heritage	http://www.czechfriends.net
Europa Nostra	http://www.europanostra.org
Falkland Islands Museum and National Trust	http://www.falklands-museum.com
Fiji National Trust	http://www.nationaltrust.org.fj/wp
Conservatoire du Littoral (France)	http://www.conservatoire-du-littoral.fr
Fondation du Patrimoine (France)	https://www.fondation-patrimoine.org
Union Rempart (France)	http://www.rempart.com
Tesouros de Galicia (Spain)	http://www.tesourosdegalicia.com
National Trust of Georgia	
Grenada National Trust	http://grenadanationaltrust.org
National Trust of Guernsey	http://www.nationaltrust-gsy.org.gg
Tájak-Korok-Múzeumok Egyesület (Hungary)	http://www.tkme.hu
Indian Trust for Rural Heritage and Development	http://www.itrhd.com
Indonesian Heritage Trust	http://www.bppi-indonesianheritage.org
Sumatra Heritage Trust	http://bws.m-heritage.org
An Taisce - National Trust for Ireland	http://www.antaisce.org

Manx National Heritage (Isle of Man)	http://www.manxnationalheritage.im
Fondo Ambiente Italiano (Italy)	http://www.fondoambiente.it
Amenity 2000 Association (Japan)	http://amenity2000.la.coocan.jp
National Trust for Jersey	http://www.nationaltrust.je
Trust for African Rock Art (Kenya)	http://www.africanrockart.org
Korean National Trust for Cultural Heritage	http://www.ntch.kr
National Trust of Korea	http://www.nationaltrust.or.kr
Badan Warisan Malaysia (Heritage of Malaysia Trust)	http://www.badanwarisan.org.my
Din l-Art Helwa (Malta)	http://www.dinlarthelwa.org
Montserrat National Trust	http://www.montserratnationaltrust.ms
Gelderland Trust for Historic Houses and Natural Landscape	https://www.glk.nl
Nationale Monumenten Organisatie (Netherlands)	http://www.nationalemonumentenorganisatie.nl
Heritage New Zealand Pouhere Taonga	http://www.historic.org.nz
Fundacao Nacional (Portugal)	http://fundacaonacional.pt
Pro Patrimonio Foundation (Romania)	http://propatrimonio.org
National Centre for Heritage Trusteeship (Russia)	
Saint Lucia National Trust	http://www.slunatrust.org
Monuments and Relics Commission (Sierra Leone)	
National Trust of Slovakia	http://www.nt.sk/en
Cape Town Heritage Trust	http://www.heritage.org.za
Hout Bay Heritage Trust (South Africa)	http://www.houtbayheritage.org.za
National Trust Sri Lanka	http://www.thenationaltrust.lk
St Helena National Trust	http://www.nationaltrust.org.sh
Swedish Society of Public Parks and Gardens	http://www.swedishgardens.se
Taiwan Environmental Information Association (TEIA)	http://www.e-info.org.tw
Taiwan National Trust (TNT)	
Explore and Discover Company Limited (Thailand)	
Siam Society (Thailand)	http://www.siam-society.org
National Trust of Trinidad and Tobago	http://nationaltrust.tt
Cross Cultural Foundation of Uganda	http://www.crossculturalfoundation.or.ug
National Trust (England, Wales and N Ireland)	http://www.nationaltrust.org.uk
National Trust for Scotland	http://www.nts.org.uk/Home
National Trust for Historic Preservation (USA)	http://www.preservationnation.org
The Trustees of Reservations (USA)	http://www.thetrustees.org
Zanzibar Stone Town Heritage Society	https://stonetownheritagesociety.wordpress.com
Zimbabwe National Trust	http://ntoz.org

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