



The National Trust  
for Scotland

# **ACCESS, ENJOYMENT AND EDUCATION PRINCIPLES**

January 2005

# ACCESS, ENJOYMENT AND EDUCATION PRINCIPLES

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## Introduction

This statement expresses the principles of access, enjoyment and education<sup>1</sup> that underpin the processes and practices of the Trust's work, both at its properties and in its broader activities. It is intended that these principles should be used in conjunction with the Trust's Conservation Principles to articulate the Trust's approach towards fulfilling its core aims and objectives. Together, these two sets of principles jointly describe the philosophy behind the Trust's operations and seek to influence improvements in the way the organisation carries out its work. More detailed operational policies will continue to be developed and integrated with those already in existence, to support these strategic level principles.

The National Trust for Scotland Order Confirmation Act 1938 introduces the promotion of access and enjoyment as a general purpose of the Trust as a result of the increase in the "use and enjoyment [of Trust properties] by the public for purposes of recreation resort and education"<sup>2</sup>. Education has since been developed to become a core means of delivering the Trust's purposes, and those of access and enjoyment in particular. These principles attempt to interpret the way in which these statutory purposes can be fulfilled in the present day. In terms of the promotion of access, the most significant legislative change since the Trust's formation has been the introduction of a statutory right of responsible access to the outdoors<sup>3</sup>. The Trust has led the way towards this legislation, managing its countryside properties whilst ensuring open public access to them.

The Trust exists "for the benefit of the nation"<sup>4</sup> and aims to provide enjoyment and education by encouraging physical, intellectual and sensory access<sup>5</sup> to the properties in its care. As a conservation body, much of the Trust's work involves the acquisition and management of properties: making this work accessible to the public gives it added meaning and purpose. The Trust aims to enrich people's lives by providing opportunities for everyone to engage with Scotland's natural and cultural heritage.

The principles that follow guide all those who, on the Trust's behalf, provide advice, make decisions about, or undertake work to significant places, particularly those in the Trust's ownership. They are relevant across the spectrum of the Trust's work. These principles refer to access, enjoyment and education with regard to Scotland's natural and cultural heritage.

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<sup>1</sup> See Appendix 1 for definitions.

<sup>2</sup> See Appendix 2 for fuller extracts from the Trust's Order Confirmation Acts.

<sup>3</sup> Land Reform (Scotland) Act 2003.

<sup>4</sup> See Appendix 2 for fuller extracts from the Trust's Order Confirmation Acts.

<sup>5</sup> See Appendix 1 for definitions.

## Access, Enjoyment and Education Principles

### PRINCIPLE 1

**Access to the natural and cultural heritage is for the benefit of present and future generations.**

The places, objects and living things that make up our collective heritage are various and diverse and their value to society will change over time<sup>6</sup>. The Trust looks after a variety of different properties because of their importance to Scotland, and this means that as many people as possible should have the opportunity to enjoy them and to learn about them. As stated in the Conservation Principles<sup>7</sup>, the Trust aims to benefit a wide range of stakeholders and communities of interest, including members, visitors (from the UK and abroad), tenants, donors, local communities and people of Scottish ancestry worldwide. It also aims to benefit those people who are not currently involved in the Trust's work but whose interest could be awakened in the future. Conservation and access are linked by the benefits they provide: without access, conservation work can only benefit the place or object being conserved and the community of interest directly associated with that work. The interaction between the public and the Trust that results from access to the places or objects in Trust care helps to develop an understanding of how heritage is valued and should encourage more people to help protect it in future.

For many people the existence of the Trust and knowledge of the role that it performs in caring for and protecting properties of significance to Scotland provides a great deal of assurance on its own, without coming into direct contact with the work of the organisation. However, the main way in which the Trust provides enjoyment and education to the public is through access to the places it looks after and to the work that it does. Unlike many other organisations, the Trust's remit is to protect both the natural and cultural heritage of Scotland and this creates a responsibility to consider all aspects of heritage and also requires a more holistic view of access provision.

### PRINCIPLE 2

**Scotland's heritage should be accessible and relevant to the widest possible range of people.**

The Trust is different from most other landowners in that it has a statutory purpose of encouraging access, and it endeavours to facilitate physical access as often as possible. This requires some assessment of the access that is appropriate to the property and its contents so that it may be suitably managed, and to ensure compliance with legislation<sup>8</sup>. However, it is recognised that intellectual access to the Trust – both to its properties and to its collective expertise – is equally important. This is provided so that people can understand the significance and context of a building, artefact, garden or area of countryside and also enables alternative access in instances where physical access is not appropriate or possible. St Kilda is a good example of this as only a small number of people are able to reach this remote island physically, yet the existence of a dedicated website and extensive literature allows a much wider range of people to learn about the island and its history. In other instances, particular areas of a property might be vulnerable or under conservation work and therefore not open to the public. Where there are restrictions on physical access it is important to explain the rationale for this in order to increase public awareness of access issues, and to provide alternative forms of access. Sensory access should also be provided wherever possible in order to

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<sup>6</sup> The heritage value of a place, object or living thing is subjective in nature and is likely to change over time. The NTS recognises a broad range of tangible and intangible values within its definition of heritage and outlines this discussion in its statement on Evaluation of Heritage Significance (2003). This contains a useful overview of the criteria that can be used to define the heritage significance of a place or material.

<sup>7</sup> NTS Conservation Principles (2003) – Principle 1.

<sup>8</sup> Health and safety regulations are a major consideration where issues of access are concerned and properties need to be regularly assessed. Other legislation such as the Land Reform (Scotland) Act 2003 and the Disability Discrimination Act 1995 are integral to decision-making on access provision.

allow those with visual or hearing impairments to experience a property or to understand the Trust's conservation work. This might be in the form of a 'touch tour' or Braille or audio-tape guide books.

Making heritage relevant, accessible and meaningful is the best way of encouraging engagement with the public. People from all cultural and social backgrounds, UK residents and visitors from other countries should all feel that the work of the Trust is accessible to them. Recognising that there are different cultures which make up our collective heritage is the starting point for ensuring that this diversity is fully explored. Reaching out to new audiences should be encouraged, providing increased opportunities for people to engage with the Trust. On a local level this can be implemented by working with communities to foster a sense of collective ownership of properties. Actively creating a climate of inclusion within the organisation will also benefit membership numbers and volunteer and staff recruitment. It is therefore important to recognise and enhance those elements of the Trust's work that could facilitate increased inclusion, for example: the content and delivery of interpretation at properties; the customer care that visitors experience; setting affordable levels for entrance fees; or promoting public transport links to properties.

### **PRINCIPLE 3**

#### **Enjoyment of the natural and cultural heritage should be encouraged in a variety of different ways.**

Scotland's heritage provides endless opportunities for people to enjoy themselves. This enjoyment of heritage can be enhanced if the Trust develops an understanding, through monitoring and research, of the expectations that people have when they engage with it. Whilst it is difficult to identify every possible activity or motivation for people engaging with the Trust, a recognition that the organisation is catering for a range of peoples' interests is essential. Meeting expectations relies on establishing the attributes that a property has and the ways in which people might enjoy this interaction. People find pleasure in different experiences, for example; seeing an early 20<sup>th</sup> century printing works operating will be of interest to some, whereas a tour of a castle will suit others. Alternatively, reading about the tapestries, paintings or plant collections in Trust care on a website or in a booklet can be enjoyable and this can be done anywhere.

Identifying what is special about a place or object should also mean that it is looked after in a way that will not detract from this significance. In practise, this means that an area of countryside or an island with qualities of peace and tranquillity should, as much as possible, be managed in a way that protects those qualities so that people can enjoy the property without its physical or spiritual essence being eroded. Retaining the spirit of a place is crucial, as much of visitors' enjoyment of a property is directly linked to the unique characteristics of a place.

Engaging with Scotland's heritage can bring multiple benefits to people and an increased level of engagement can provide greater benefits. This can be facilitated by the provision of education or through more practical involvement with the work of the Trust, such as volunteering. Taking part in Thistle and Trailblazer Camps or Corporate Challenges<sup>9</sup>, whilst helping in the conservation and management of properties, can also generate enjoyment for participants and the staff involved and benefits the local community acting as host to the project. Holiday cottages on Trust properties also provide enjoyment whilst contributing financially towards continuing conservation work.

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<sup>9</sup> Thistle Camps are residential working holidays that cover a variety of work on the Trust's countryside properties, eg footpath repair or woodland management. Trailblazer Camps are aimed at 16 to 17-year-olds and include a programme of action/ adventure type activities in addition to the conservation work programme. Corporate Challenges are designed for businesses and organisations to support the Trust's work whilst benefiting from a team-building experience.

## **PRINCIPLE 4**

### **Providing a wide variety of educational opportunities is an investment in the future of Scotland's heritage.**

In order to capture interest and commitment from the widest possible range of people, the Trust provides a variety of learning opportunities aimed at all ages and abilities. The Trust promotes an extensive programme of educational and interpretive activities for formal and informal learning, with issues of access and conservation playing an integral part<sup>10</sup>. Educational programmes and opportunities developed by property staff and specialist education staff allow learners to interact with and benefit from the Trust as an educational resource. As the Trust is concerned with both the natural and cultural heritage, this balance is reflected in its educational activities. Formal learning is made available through high quality educational experiences for schools and research opportunities for colleges and universities within Scotland and in the wider international community. Informal learning can be facilitated through the provision of interpretation, special events, courses, guided walks and lectures. Enabling community involvement, to interest local people in the natural and cultural heritage of their area, is another important part of the educational function of the Trust. Thorough research helps to ensure that educational programmes and materials are not only enjoyable but are also factually accurate. Education within the Trust contributes to the overall image and reputation of the organisation.

Enjoyable learning experiences are always the most effective. The visitor experience at a Trust property should be stimulating so that visitors are encouraged to learn more about Scotland's heritage and about the work of the Trust. The Trust aims to encourage conservation through education and recognises that all of its properties are educational resources in themselves. The Trust therefore needs to invest in education in order to provide benefit to present and future generations. An ongoing commitment to develop and support educational activities is necessary to ensure that they are relevant and accessible to all.

## **PRINCIPLE 5**

### **Interpreting Scotland's heritage requires research based on integrity and understanding.**

Communicating the essence of a Trust property or its conservation work to the public requires a combination of information and explanation; making this experience interesting and enjoyable is the purpose of interpretation. Effective interpretation entertains, provokes and inspires in order to enable understanding and to promote conservation. The Trust uses a variety of interpretive methods and media to enable people to understand the place that they are in and to reveal the significance of it as part of Scotland's heritage, but the information that this interpretation is based on needs to be current and accurate. The Trust plays an important role in presenting images, items and places from Scotland's past and the way that these are presented can be influenced by a range of factors. Contemporary scholarship on the subject should be one of these factors and the Trust aims to continue to increase understanding of the places and objects in its care. Support for ongoing research is vital for developing conservation, access and education expertise. Other factors include the methods used to deliver interpretation and the style of presentation, which will change over time and will ultimately have an influence on intellectual access<sup>11</sup>.

Providing the relevant context for an historical event can entirely change a person's reaction to a place or object. Being able to update interpretation across the Trust is crucial in keeping the organisation dynamic and relevant to existing and potential members and visitors.

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<sup>10</sup> The Trust's Education Policy sets out in more detail how the Trust aims to facilitate appropriate access to resources for educational purposes.

<sup>11</sup> See Appendix 1 for definitions.

## **PRINCIPLE 6**

### **Enjoyment can be enhanced by excellent customer service and a high standard of facilities.**

People come into contact with the Trust in a wide range of ways, with differing levels of commitment to the organisation and its work. As stated in Principle 1, the Trust aims to benefit a wide range of stakeholders and communities of interest. Enjoying and learning about what the Trust does encourages people to value their natural and cultural heritage and in order for everyone to enjoy their experience, attention must be paid to interactions and communication at all levels. The Trust aspires to provide excellent customer service on every occasion.

The Trust provides facilities at its properties for a variety of reasons, but the overall intention is to enhance the visitor experience. These range from the basic provision of toilets, parking and signage to more developed facilities such as interpretation, educational programmes, catering and retail. Facilities serve multiple functions, including: increasing understanding and enjoyment; providing income; acting as a local community resource; and managing visitor access. The Trust aims for all of its facility provision to be of a high standard, exceeding visitor expectations and needs. In order to do this without impinging on the conservation value of a place, satisfying visitor needs must always be balanced with the type of property and its condition.

The Trust's reputation relies on every encounter – if it is enjoyable, and improved by the service provided by staff and volunteers, then it is more likely to be repeated. Building commitment from individuals or groups, from visitor to member to legacy pledger, is dependent upon consistently high standards in customer care and a genuine welcome. The Trust strives to ensure that this happens through investment in its staff and volunteers, through providing adequate training, including in customer service and care.

## **PRINCIPLE 7**

### **Visitor management planning is fundamental to integrating access, enjoyment and education with conservation.**

The Trust aims to manage visitors to its properties in such a way that the needs of the visitor and the natural or cultural resources are in balance with each other and with other factors, such as the needs of the local community and the requirements of funding bodies. Education and interpretation are crucial in achieving this balance; to protect fragile environments, manage visitors on-site and encourage responsible behaviour and a sense of ownership. Explaining the value and character of a place allows people to understand the factors determining a property's capacity to cope with visitors. Responsibly managing the way in which people can physically experience a place through visitor management planning enables maximum access with minimum impact. In order to do this, survey and monitoring are essential, measuring visitor numbers, frequency and activities at properties. Evaluation of the overall experience by a visitor to a property allows the Trust to establish if expectations are being met, and to revise operations if they are not. These quantitative and qualitative indicators are vital for future improvements and for the adequate protection of the heritage in Trust care.

The Trust aims to lead by example in providing ways of experiencing special places without compromising their significance. Management statements are drawn up for each property<sup>12</sup> which address all aspects of property management, including issues of access and use. Policies such as the Wild Land Policy (2002) also help to guide the Trust and others in managing remote areas with special qualities. The Trust strives continuously to develop best access, enjoyment and education practice by working in partnership with other relevant bodies.

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<sup>12</sup> For further information see Revised Guidelines for Property Statements (2002), available from the NTS Management Planning Team.

The Trust's other aims, including its other statutory purpose of conservation, are generally complementary to that of access, enjoyment and education and most conflict between them can be resolved by good planning, management and negotiation. The Trust is committed to addressing potential issues and resolving them as soon as possible. However, as stated in the Trust's Conservation Principles<sup>13</sup>, where two aims prove irreconcilable the Trust should always give greater weight to conservation where significant features are at risk, in line with the established 'Sandford Principle'<sup>14</sup>. As the Trust is empowered to hold its properties in perpetuity, their long-term conservation must take priority so that their significant features can be retained for the benefit of future generations. This principle places a shared responsibility on all involved to seek reconciliation where possible, and a particular onus on conservation specialists to be clear about the significance of places or features.

## **PRINCIPLE 8**

### **Providing access, enjoyment and education requires appropriate knowledge, skills and the provision of adequate resources.**

Access, enjoyment and education provision requires a combination of practical and professional skills, in-depth knowledge of particular specialist disciplines and effective project management. Practitioners, whether staff or volunteers, should follow accepted internal and external best practice, which exist for many aspects of access, education and interpretation. Investing in training and research in all of the various specialisms and publishing the results are fundamental parts of the Trust sharing its collective knowledge. Making others aware of its approach to these core activities can help to take forward best practice. Adequate resources must be secured to allow access, enjoyment and education to be provided both in the short and long term.

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<sup>13</sup> NTS Conservation Principles (2003) – Principle 7.

<sup>14</sup> The 'Sandford Principle' originated from the Sandford Committee which, in its 1974 *Review of National Park Policies* in England and Wales, recommended that legislation relating to National Parks should be amended to make it clear that the enjoyment of National Parks by the public 'shall be in such a manner and by such means as will leave their natural beauty unimpaired for the enjoyment of this and future generations'. The concept was endorsed as government policy and has since appeared in legislation. National Park legislation for England and Wales now also recognises that cultural as well as natural heritage must be embraced by the Principle.

### **DEFINITIONS**

The following definitions are intended as an indication of how these terms are used in the context of the Trust's work.

- ***Access***

The right or ability to enter, approach or make use of a place or thing. The Trust's integrated approach to access requires it to use the term to refer to a whole range of methods which describe the way people relate to and interact with the organisation. These are outlined as follows:

Physical – giving people the opportunity to enter and experience Trust properties. Properties vary in type and direct physical access is facilitated in a range of ways.

Intellectual – various ways in which to gain information and to engage with the work of the Trust and its properties either remotely (eg books or the internet) or on site (eg interpretive guiding). It concerns making the collective knowledge and expertise of the Trust widely available.

Sensory – meeting the requirements of those with visual or hearing impairments. The Trust can provide a range of media through which to interpret its properties and conservation work using a mixture of touch, sound, sight and smell.

- ***Enjoyment***

Experiencing joy or pleasure in something. Enjoyment can also refer to having the use or benefit of a place or thing; in the Trust context this means that people can 'enjoy' the benefit of access to Trust properties. The Trust provides opportunities which allow people to be stimulated physically, intellectually or emotionally.

- ***Education***

Enriching people's lives by sharing knowledge. Education is the process by which the Trust shares information on subjects and issues; it enables people to develop skills for use in many aspects of their lives and provides people with opportunities to learn more about how and why things happen, often providing first hand experiences to learn from. To facilitate learning, the Trust uses interpretation as its principal means of delivering informal education.

### **EXTRACT FROM THE NATIONAL TRUST FOR SCOTLAND ORDER CONFIRMATION ACT 1935**

The National Trust for Scotland shall be established for the purposes of promoting the permanent preservation for the benefit of the nation of lands and buildings in Scotland of historic or national interest or natural beauty and also of articles and objects of historic or national interest and as regards lands for the preservation (so far as practicable) of their natural aspect and features and animal and plant life and as regards buildings for the preservation (so far as practicable) of their architectural or historic features and contents so far as of national or historic interest.



***EXTRACT FROM THE NATIONAL TRUST FOR SCOTLAND ORDER CONFIRMATION  
ACT 1938***

The purposes of the National Trust for Scotland shall be extended so as to include the promotion of

- (a) The preservation of buildings of architectural or artistic interest and places of historic or national interest or natural beauty and the protection improvement and augmentation of the amenities of such buildings and places and their surroundings;
- (b) The preservation of articles and objects of any description having artistic or antiquarian interest;
- (c) The access to and enjoyment of such buildings places articles and objects by the public;

And all such purposes shall be deemed to be purposes of the Order of 1935.

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