

# Atholl Estates

## Forward Plan 2011 – 2014



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# Foreword

The Forward Plan has been written to enhance the understanding and knowledge of the estate for all who live and work here. It explains the estate policy and direction, how we aim to set about the work in hand and the principles that guide our decision making.

Following on from the last three years when the management structure was revised to reflect a more vertical line of responsibilities and a number of new projects were initiated, a decision has been taken to continue with and further refine the management structure and to build on and consolidate the projects undertaken in the last three years. However in any diverse estate such as Atholl, there are inevitably unforeseen events that can affect the running of the business, these and their knock on effect will be tackled on a case by case basis, but that will be done with due consideration for the guiding principles explained in this document.

The plan covering the three years from 2011 should be read in conjunction with the estate induction pack, which contains the facts, figures and expectations that relate to the estate as it is today. The induction pack is updated annually.

I would like to thank the management team for all the hard work that has gone into this plan, I commend it to you and hope that from reading it you will gain a greater understanding of the work on the estate. We all remain committed to openly discussing current and future estate plans. Communications is a two way process and we are open to suggestions or questions where something is not clear. The door is always open.

Sarah Troughton

Head Trustee

# Policy Statements

## Blair Charitable Trust

The trustees are Sarah Troughton (chair), Sandy Stewart and the Dickinson Trust.

The aims of the trust are:

The maintenance, preservation and presentation to the public of historic and architecturally outstanding buildings within its ownership, notably Blair Castle (Grade A listed) and its contents. The promotion of estate land-based interests, whilst providing a planned and structured approach to recreation management and environmentally sensitive development.

The protection and management of land within its ownership, encouragement of public enjoyment of the land, looking after the rural land uses of farming, forestry and field sports and promoting a harmonious balance between these uses, recreational pursuits and conservation ideals through discussion and assessment with local groups, users and national bodies. The provision and management of visitor facilities to a high standard and the increase of visitor understanding, thereby enhancing enjoyment.

The Blair Charitable Trust owns the Castle, its park, the home farm and the lands generally known as the West Hand, Glen Fender and Forest Lodge.



## Family Estate

The rest of the estate is in family ownership that shares the aims of the Charitable Trust, although with less emphasis on historic buildings and more emphasis on promoting commercial opportunities.

We aim to bring a business focus to land management, creating opportunity, maintaining and creating jobs and providing accessible, high quality rural facilities.

## Public Interest

Management of the estates will be governed by standards of responsibility for the well-being of our staff, customers, neighbouring communities and the built and natural heritage.

We acknowledge our obligations to deliver social and environmental benefits as part of our business objectives.

Our public interest commitments over the period of this plan are detailed in Appendix A - Code of Practice.



## Overview

The next three years will be a period of relative consolidation following the management changes and new activities introduced since 2005.



## Administration

Financial Control (which includes the preparation of statutory accounts, management budgets and accounts, VAT returns, salary and wage administration, supplier and customer invoices, council tax, managing the pension scheme and general estate insurance.)

There are no significant changes planned to any of these processes or staffing. Budgeting with quarterly reviews has become established in all departments with most staff now familiar with why it is necessary and how to work with it.

The fragile investment markets are expected to maintain pressure on our final salary pension scheme which will require careful attention over the period of this plan.

Ardchattan Estate farm manager retires in 2011 and with him his wife, who has been the farm secretary. It is anticipated that farm administration will move to the Atholl Estates Office as part of the restructuring.

Information Technology (which includes broadband internet connections, computer networks and telecommunications.)

The estate office server is due to be renewed in 2011 and the office telephone system will be replaced with digital bringing them in line with the castle and caravan park.

The castle ticketing office sales station will be connected to the gamma server by a new wi-fi link and all our accommodation bookings will move over to a new software system to replace Profit, which currently runs the caravan park. The new system will either be fully networked around the estate or it will be internet based.

## Marketing

Our plans to develop marketing on the estate over the next three years include:

**Incentive Scheme:** The scheme will offer purchasers a range of benefits including free entry to Blair Castle and gardens and discounted rates on estate activities and events.

**Sales Hub:** A centralised service will be developed to provide a single point of contact for telephone information, bookings and sales. Probably based at the caravan park and operating 7 days a week.

**Destination Marketing:** We must further develop our joined up marketing across all estate enterprises to present the estate as a destination visit. On a wider scale, we will support the activities of both the Cairngorms National Park and the Highland Perthshire Destination Management Organisations, providing collaborative promotion and visitor information.

**Communications:** With media developing so rapidly we will develop the way we communicate with customers to provide for social networking, blogs and on-line forums.

Travel trade is a very important market for us and we will manage our business with the main operators by developing stronger relationships with each office and present our seasonal information two years in advance to fit with their sales and promotions.

We will increase efforts to reach social groups to promote our special tours and in recognition of the significant overseas trade we will improve our 'in language' print for international visitors, particularly on our website.

Conventional communication with our customers will continue to encourage repeat visits but made more efficient and effective by better integration of our database management through the Gamma system.

**Customer Feedback:** a new system for inviting feedback and collating results, called DOVE, will be introduced around all accommodation, activities and the castle. Feedback reports will be circulated to staff regularly and the information will be used to direct future project development and business planning.

**Advance Pricing and Event Programming:** we aim to be two years ahead for setting dates and tariffs for regular events and main seasons which are required by the travel trade. We also aim to be two years ahead for accommodation tariffs and three years ahead for wedding and functions. With this information set so well in advance, relevant print can be produced to support sales at during the key market periods.

**Visit Scotland and Green Tourism Grading:** Marble Lodge, Forest Lodge and land rover safaris will be graded under the Visit Scotland standard so they can be included in their marketing promotions. We will also look for opportunities to simplify the grading process for Green Tourism around the estate to tie in with our use of the Cairngorms National Park logo.

# Tourism

## Blair Castle

A revised welcome and orientation room will be launched for spring 2011 along with revised room notes to link with a review of car park signage and a new guide book in 2012.

Special tours will be developed and promoted to groups and travel trade to include themes on Lady Evelyn, the Jacobites and the Attic. These tours will also continue to be scheduled over the weekends and holiday periods of the main season. Children's tours have been successful and will continue to be developed.

Christmas opening was trialed during 2010 and that experience will shape how we promote and operate this over the coming festive seasons. It will take a few years to raise awareness around regional accommodation providers.

The gardens way-finder leaflet will be improved and clarified and we will continue to raise awareness of the Sculpture Trail. A mobile catering service will be introduced to the gardens in 2011 which will also sell at the caravan park during the mornings and evenings. Unauthorised entry to the gardens continues, possibly provoked by inaccurate information on satnav devices and internet visitor forums. The entry routes will be identified and the problem addressed.

Once visitor entry flows are brought under control, the location of the ticketing office will be reviewed with the intention of bringing it into the car park vicinity.

Wedding and functions sales will be targeted to match 2009 levels for gross margins. We will negotiate for our alcohol licence to

provide more flexibility for opening times and the functions manager will work closely with the 2013/14 castle painting plan team to minimise impact of that work to sales over those two seasons by the use of cherry pickers instead of scaffolding where possible.

We will raise awareness in the markets of the castle's potential for high end corporate functions and events, taking advantage of the dining room's smaller banqueting proposition. To effectively sell into the corporate market we need to be clear and efficient in our sales processes which will require us to improve our knowledge and presentation of service expectations and limitations as an objective for 2011.

With the rapidly increasing price of energy we will set up means of measuring consumption across the castle to inform where we need to improve efficiency and change costly operating systems.



# Accommodation

## Caravan Park

The park currently offers a wide range of pitch sizes and services which makes the booking process complicated for staff and customers and impossible to develop for on-line sales. A strategic review of the park's layout will be completed early in 2011 based on demand and gross margins which will inform the creation of a new and simplified layout design.

The delivery of the new layout will have to be phased over at least six years but during the intervening time, all existing pitches will be repaired to a consistent standard.

Shower block 2 is next in line for renovation and may require some extension depending on potential increased demand from the pitch layout review.

In addition to some of the pitches, other parts of the park are starting to look worn and particular attention will be focused on improving the play area, planting amenity trees and replacing the grey water waste disposal.

## Woodland lodges

Although demand for the first five woodland lodges was rapid to develop after completion in 2009, booking rates stabilised in 2010 but below what we require to pull forward early investment in the next phase of six lodges. We will push winter and shoulder season promotions over the next two years and monitor occupation rates with a view to reconsidering phase 2 in 2013.

## Historic lodges

Old Blair Lodge will have its furniture and decoration refreshed.

Historic lodges booking rates have increased steadily over the last eight years and they are now all providing a significant and reliable annual income. However, spring occupancy could still be improved and this will be the priority for promotions.

## New premises

Castle wedding functions would benefit from having a small property available for the bride and groom. The property would need to be in the castle grounds and the use of the Apple House at Hercules Garden will be researched.

The potential for developing holiday chalet accommodation at Cally Loch, Dunkeld has been adversely affected by the recession and indications of a slow recovery. There is no intention to further develop this project over the period of this plan.



# Events

## Horse Trials

In 2011 we once again have the challenge of welcoming leading young riders from across Europe to Blair for the 2011 European Under 21 Championships.

Beyond these championships it is the intention to retain Blair Castle International Horse Trials as a 'must go to' event for every Scottish equestrian enthusiast whether on a horse or on foot ensuring Blair is an inclusive event for all ages and our marketing will emphasis this.

The horse trials have won several national awards in recent years most notably from the British Equestrian Trade Association. These accolades are a reflection of the popularity of the event as a retail experience and we shall continue the improvement and development of this aspect.

Sponsorship is another key growth target. Despite these challenging economic times we have retained loyal support from our sponsors as they recognise the value of an association with the event. Promotion to new sectors and new partners is a key area for growth, particularly at the title sponsor level.

On-site accommodation for caravans and camping has been a success in the Target Park and we intend to further increase sales to make best use of the available area.

We will further develop and upgrade the site and infrastructure as we continue to work with the farm and establish the best possible overlay for the event. Improved vehicle routes and electrical / water services within the event will be required if we are to grow and we need to review the location of the cross country

start/finish and the stables area given recent year's weather which would also free up more appropriate arena and working space where the lorries are currently parked. Special funding from championship events and sponsorship will be targeted where possible for these improvements.

Recognising that we are the largest and leading international equestrian event in Scotland, we shall continue to promote Blair as a true championship venue, submit bids to the International Federation to host further championships and continue the legacy of the London Olympics beyond 2012.



# Activities

## The Atholl Gathering

Reaction to the Atholl Highlanders organising ring events in 2010 was positive and events of the next few years will be used to consolidate this new arrangement.

## New Events

We will not be starting any new major events where we carry the financial and management risk but we will continue to be interested in working with others as an event host, particularly when that event has a proven track record and is looking to relocate.

## Television Productions

We will further develop our reputation as a friendly and efficient venue for media and entertainment events and improve our links with production companies to encourage more to consider us as a venue.



## Pony Trekking

The trekking centre will be restructured to reflect anticipated market demand and to allow for bookings through gamma at all sales points around the estate. A simplified and lighter staffed centre will operate for at least the next three years, aiming to keep overheads low during the spring and gear up for summer trade during the summer months alone. The centre operator will work with game and farms during the closed season and when not training young ponies.

## Land Rover Safaris

Scheduled safaris will continue to be run during weekends and school holidays during the spring, summer and winter along with private safaris by arrangement. We will trial a shuttle service during the summer months from Blair Atholl to Craigurrad as a cheaper alternative, based at the ranger centre car park. We will also trial a ride-and-walk service to Clachglas as a private group booking service by arrangement.

## Tractor Tours

The castle tractor rides will operate a more restricted summer season as demand has been consistently low during the period from Easter to the end of May. We will also begin to actively sell tractor rides to the travel trade/group market. The scheduled tractor tours programme is successfully balanced and will continue as previously. To enhance the visitor experience, we will equip the trailer with audio so the driver can deliver supporting descriptions as part of the tour.

# Rural Enterprises

## Farming

Balanloan will remain a store cattle producing unit and Balachallan will continue to finish most of its calves, both units cattle stocking will remain unchanged. The cattle stocking policy for Balachallan will be reviewed to establish if there is a commercial benefit to change the terminal sire to Aberdeen Angus.

Sheep stocking is stable and healthy on both farms and the current husbandry regimes will remain in place.

Both farms will remain organically accredited for the period of this plan and we will review options following 2013 in light of market demand and public support payments at that time.

We will address the shortage of winter forage at Balanloan by taking back forage land in-hand at the first opportunity.

Welfare and management of the pony herd will fall into the core farm livestock husbandry regime during the winter at Balanloan as part of the trekking centre re-structuring.



## Forestry

We will recruit a full time forester which will build the squad to two foresters, a deer ranger and a role which is split between forestry and deer control.

Long term forestry plans will be completed for Bruar Trust and Sarah Troughton woods in 2011 and for Blair Charitable Trust woods in 2012.

We do not expect to plant any new woodlands during the period of this plan although some significant replanting sites will be active at Killiechangie and Blairuachdair. Deer control on replanted sites will continue to be by population management rather than site fencing.



## Field Sports

There are two distinct deer herds that roam the Forest of Atholl and they are divided east and west of the Bruar Water. The West Hand population density is currently around 19 per square kilometre which is producing a stable grazing balance with heather now in good condition and further recovering. The east herd population is around 23 per square kilometre and their grazing territory includes Beinn a Glo site of special scientific interest which is subject to a deer reduction plan. The east herd target population by the end of this plan is 18.

Dalnamein hill will be brought back in hand for low density sheep farming, possibly under a contract farming arrangement, primarily to provide tick control and vegetation management.

Diversionsary feeding of hen harriers during the breeding season will be trialled during 2011 in one location and if considered successful, will be extended to other nesting sites in subsequent years. The trial in 2011 will also consider if there is potential for photo tourism around the feeding stations.

Moorland management on the Tulliemet Hill will be linked with the start of accompanied sport stalking for roe and fallow deer, basing guests at Convalloch Lodge. The Deuchary wood will also be opened up for deer stalking and the march fence with Rotmell farm renewed.

## Countryside Management

Heather recovery from reduced deer grazing and increased muirburn on the northern sporting beats will be monitored and results fed into the deer management plan. Black grouse protection through predator control on the hill margins around Kindrochet, Bruar and West Hand will continue as will predator control and heather burning on the Tulliemet Hill to support the Forest of Clunie SSSI.

Grey squirrel population control around Dunkeld will start in 2011 under an SRDP funded scheme, aiming to halt their progress north and defend the red squirrel territories around Pitlochry and Blair Atholl.



## Ranger Service

A permanent second ranger will be employed for ten months of the year and a seasonal ranger employed for the main visitor period.

We will collaborate with the Cairngorms National Park through jointly upgrading the information centre interpretation and holding deer awareness days for schools to run on alternative years with the estate open day.

More communication with the public will be via the internet as we start a blog on the ranger service website specifically to encourage walkers and cyclists to note anything of interest or concern. We will also work with SNH and the Mountain Council of Scotland to develop the current Hillphone system to be web based under the project title, Heading for the Scottish Hills.

Access paths and infrastructure will continue to be maintained, the most significant work likely to be re-routing and strengthening the River Tilt path with support from EU funds and collaboration with Perth and Kinross Countryside Trust. We also plan to identify smaller conservation and access improvement projects across the estate so we can more effectively work to mutual advantage with volunteer groups.

## Residential lettings

There will be no change in policy for let housing. We will continue to presume in favour of locally employed applicants and rents will be kept at a level which is locally affordable with the exception of higher rents for newly and expensively converted properties.

## Farm lettings

In the event of land coming back from farm tenancies during this plan, our approach to reallocating it will be to firstly assess the needs of our in-hand farms, secondly the needs of our existing tenants and thirdly the potential for re-letting it to young entrant but all in the context of what is also best for the land.



# Properties

## Maintenance Department

### Admin

We aim to improve our communication with tenants and limit our work planning to what we can realistically complete within the committed time scales. The combined effect of these changes should be more cases where we meet or exceed the tenant's expectations.

The location and description of main services to properties will be collected and digitised on to Agility software and that system kept up to date as new information is discovered. A facility will be created at the park and castle for jobs to be directly logged onto Agility and thereafter tracked.

### Squad

We will keep the squad at 6 men and develop the working foreman's role, providing a team of 3 to do projects and a team of 2 for jobbing, with the foreman supporting where required.

The squad will continue to tackle larger projects occasionally when the circumstances require.

The teams will take greater responsibility for keeping tenants informed of when they expect to arrive and what they will be doing, with support from the works administrator.

Communication between teams and office will also be improved by the effective use of the job sheet and stock control systems which will lead to improved work programming and tenant service.

### Contractors

Service level expectations will be defined with each local contractor which will form the basis of simple terms of engagement to be signed off individually. These terms will include communication, response times and invoicing.

### Castle Maintenance plan

The external maintenance plan, developed and implemented in 2009, has now become established and is working effectively. We will now develop an internal maintenance plan to deal with items such as drains, traps, filters and servicing.

Trace heating installation along gutters known to hold water during snow thaws has been successful and we will selectively continue with this as further prone areas become apparent.

### Castle External Painting

A programme and method statement will be developed in 2011 to form the basis of tendering in 2013 for site start in spring 2014.

The early preparation will inform exhibition and function operations of the likely impacts during each period of the two year project.

# Infrastructure

## Water supplies

We aim to upgrade the Glen Fender and Kinnaird private water supplies during the period of this plan. Other supplies which have not been improved will be kept compliant by maintenance of the intakes and use of water filters in each residence.

## Bridges

Each vehicle bridge on the estate will be inspected during the period of this plan, its location and condition logged and any urgent vegetation clearance works completed during the initial inspection. Thereafter any more significant repair works can be surveyed and programmed accordingly.

## Caravan Park

Once the revised pitch layout design is confirmed, a master plan to replace the park's water pipe will be established with a probable phasing over 6 years. Phase 1 will be done in 2012. Any upgrades or changes to electrical or drainage services to pitches will also be picked up as part of the plan.

## Residential Property

We will continue to upgrade the standard of our housing stock taking the opportunity between lets to do any disruptive works and paying particular attention to address dampness, whether penetrating or through condensation.

Within the period of this plan we will ensure all properties have hard wired smoke alarms installed and electrical systems that have earthing and fusing compliant with IEE 17th Edition standards.

# Development

## Energy Generation

We aim to develop small scale hydro generation schemes on the Dowally and Broom burns in collaboration with Gilkes Energy during the summer and autumn of 2011, both with generating capacity of 450kw. We will also work with Gilkes to assess the viability of a scheme on the upper Bruar Water during 2011.

There are no plans to consider other types of generation during the period of this plan.

## Housing

The economic recession and the availability of mortgages have impacted negatively on house prices and that is likely to continue for the period of this plan. We will bring sites to the market that have local demand, such as Bual Bhain in Ballinluig, but otherwise our focus will be on engaging with the local authority's Local Development Plan as it matures over the next few years. The LDP will set property development options for the period from 2014 to 2020 so it is important for our interests to be fully represented.

## Commercial

There are no plans for us to develop any further workshop or retail space during the next three years but, as for housing sites, we intend to present deliverable options to the LDP for future commercial sites on the estate.

# Appendix A:

## Atholl Estates Code of Practice 2011-2014

### Working together

- Demonstrate a good model of an integrated approach to rural resource management.
- Play a full and active part in any partnerships whether local interest groups, government or non-government agencies.

### Working with our commercial tenants

- Be open and transparent in our dealings and regard the landlord/tenant relationship as a business partnership.
- Recognise landlord responsibilities and carry them out effectively.

### Working with our housing tenants

- Give priority under our allocations system to applicants who are locally employed.
- Maintain rents at levels that are locally affordable.
- Ensure all arrangements are in plain English and that we are easily accessible and accountable to our tenants
- Recognise landlord responsibilities and carry them out effectively.

### Working for the environment

- Exercise good environmental stewardship
- Recognise the value of natural and built heritage, sustainable development and show commitment to working with others to enhance these.

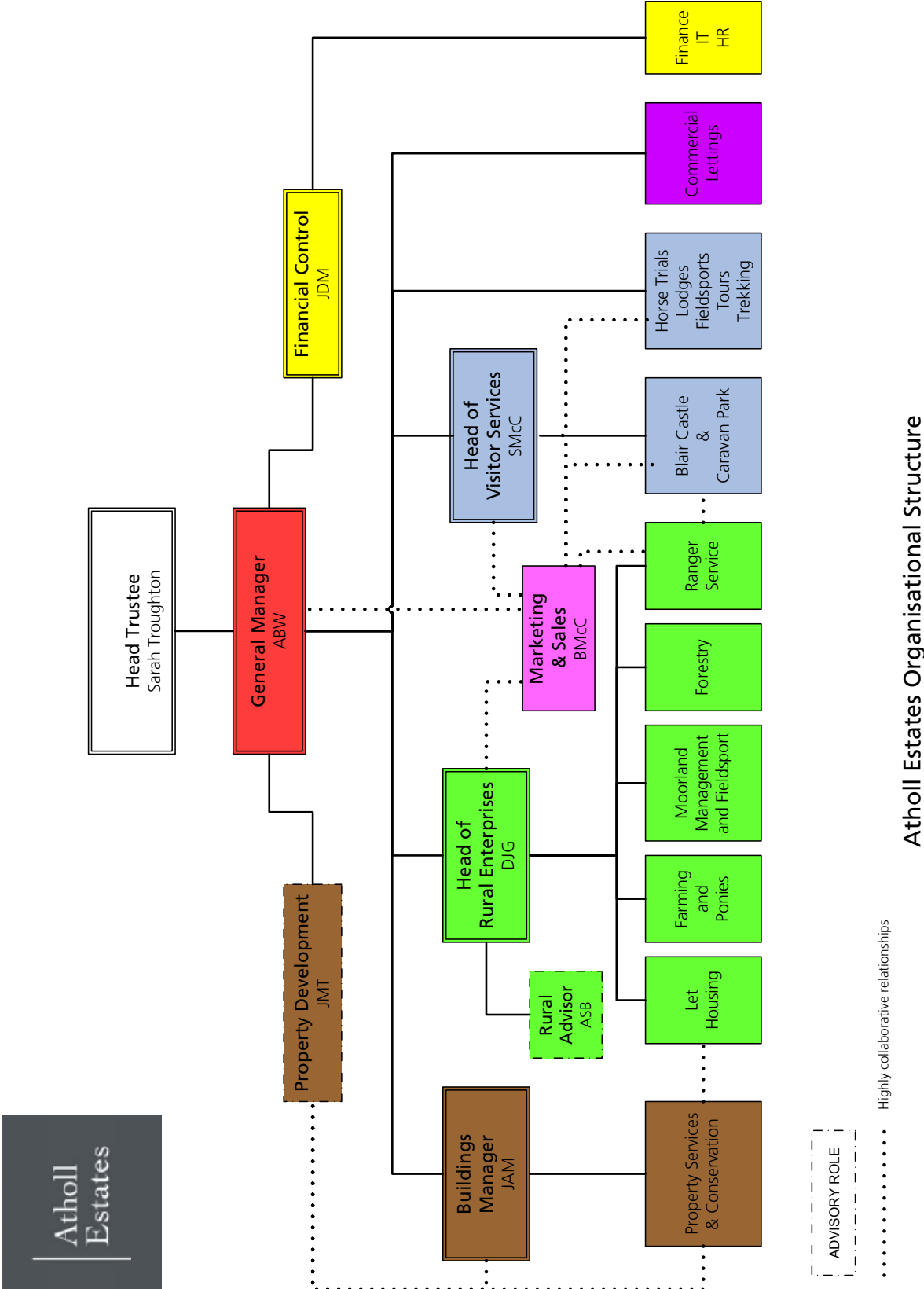
### Working with our staff

- Acknowledge the immense value of staff and promote employee development, protection and long-term benefits
- Ensure clear lines of communication within our staffing structure to maintain clarity in roles and objectives while encouraging feedback and staff input to the direction of our business
- Recognise exceptional personal and group achievement and performance

### Working with the community

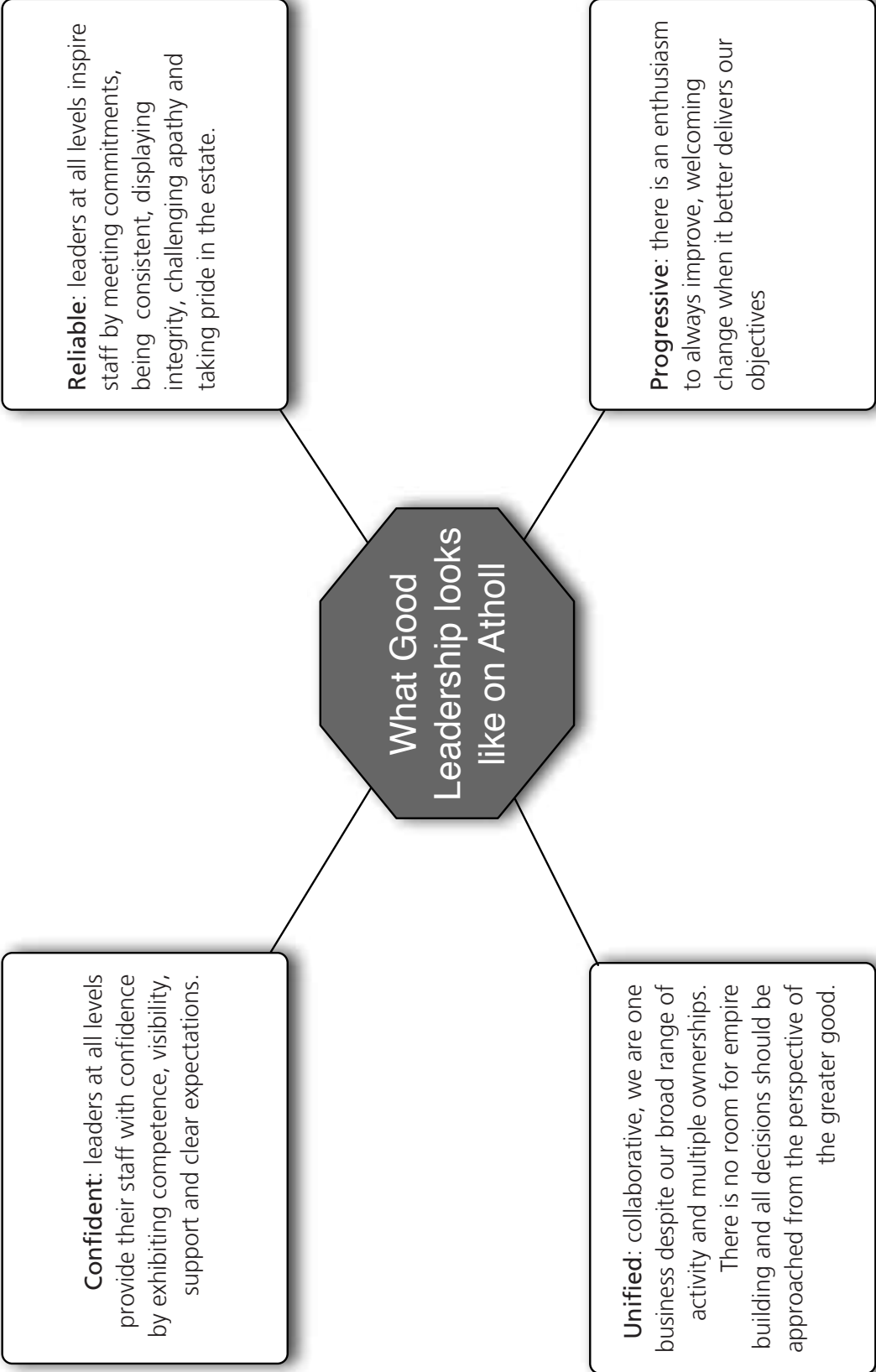
- Maintain clearly identifiable and accessible local representation
- Play our part in and support local development initiatives
- Be committed to informing and, where appropriate, consulting with communities in relation to land use decisions.
- Support local jobs when possible.

# Appendix B: Atholl Estates Management Structure Diagram



Atholl Estates Organisational Structure

# Appendix C:



# Appendix D: Atholl Estates Communication Policy 2011

Atholl Estates aims to communicate openly with our staff, local community and the general public both to inform and receive feedback about the work that we do.

We aim to achieve this through informal daily interaction but also through a number of managed actions.

General	Purpose	When
Publication of a bi-annual newsletter	Distribute information on estate news	Winter & Summer
Website (www.atholl-estates.co.uk)	Becoming our primary 'shop window' for customers and the general public	Ongoing
Open Day held every other spring	Mainly for primary school audience but open to the general public	Spring 2012 & 2014
Ranger Service events and Information Centre	Recreational access support	Ongoing
e-Newsletter	Distribution of visitor services news to customers in our database	Monthly

External	Purpose	When
Attendance at local community meetings	Maintain links with local representatives and support local initiatives	Ongoing
Involvement with Local Authority policy forums	Ensure the best interests of the estate and the local area are being taken account of at regional government level.	Ongoing
Personal and informal interaction with local and regional representatives	Promotion of good relations at both work and personal level.	Ongoing
Estate visits for Local Authority and Scottish Parliament representatives	Exchange of ideas and opinions, development of better mutual understanding.	Ongoing
Publication of events and news in regional/local media	Delivery of information about changes or news items to the general public to benefit public relations and promote the business.	Ongoing

Internal	Purpose	When
Staff bulletins	Distribution of up to the minute information and news to staff	Monthly
Management meetings	To discuss and present relevant issues that can then be cascaded through departments	Quarterly
Department team meetings held at least 4 times each year and attended by senior management	To allow a two way information exchange between management and employees on issues relating to their operations	Various
Provision and annual updating of individual staff induction packs	General information on estate business and operations	April
Annual individual staff development reviews with 6 month reviews where necessary	Opportunity for every member of staff to discuss their role, objectives and development with their line manager at least once each year.	January to March
Estate visits	Opportunity for operating groups to show colleagues what they do and their contribution to the business	September to June
Memorandums	Statements of policy and important news for placing on the record	Ongoing