



# Estates Strategy

## Agenda Item 5

### National Park Authority Board Meeting

12 June 2023

Paper for decision

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## 1. Purpose

1.2. The purpose of this paper is to seek Board approval for a new Estates Strategy for the organisation.

1.3. To date, decisions about the National Park Authority's Estate have been made on a case-by-case basis, with reference to the relevant National Park Partnership Plans and Corporate Plans or where specific initiatives have required the improvement or creation of assets e.g. campsites to enable camping byelaws. However, until now there has been no overarching strategy document that sets out how we want to use our Estate to achieve the broader goals of the National Park.

To fill this gap, the proposed Estates Strategy aims to:

- describe how the strategic contribution of our Estate can be leveraged for the benefit of the National Park
- establish the principles we will apply when taking decisions about our Estate

- set the priorities for the future development and maintenance of our Estate
- establish criteria for the National Park Authority's involvement in off-Estate infrastructure

## 2. Recommendation(s)

Members are asked to **approve** the proposed Estates Strategy described in this paper and attached as Appendix 1.

## 3. Contribution to National Park Partnership Plan and/or Our 5-year Plan

2.1. Our Estate is one of the enablers highlighted in Our 5-year (Corporate) Plan 2018-2023. The Estates Strategy also contributes to the Plan priorities of Visitor Infrastructure and Sustainable Organisation.

3.1.

## 4. Background to our Estate

4.1. The National Park Authority's Estate is diverse, multi-functional, and serves a number of internal and external stakeholders and interests. A large portion of our Estate was inherited when the National Park was established, with a number of properties transferred to us from Local Authorities or developed by predecessor bodies. A [paper setting out the extent of our Estate was presented to the Board in December 2018](#) and is a useful reference.

4.2. Since then, the Estate has evolved through incremental changes, including us taking on or developing additional properties through time. Examples include the Carrochan building, the 5 Lochs Visitor Management Plan in the east of the National Park and then Loch Chon and Loch Achray campsites. We have also invested in our Estate in recent years, including recently through the Rural Infrastructure Tourism Fund, our Mission Zero plan, and the Place Programme.

4.3. As it stands today, our Estate serves many purposes, ranging from supporting National Park Authority operations and strategic outcomes, to serving visitors and communities. It varies from large operational buildings, to smaller, more dispersed recreation sites. We lease some of our properties to commercial tenants largely in the tourism sector, and we ourselves lease some of our properties from others. Much of our Estate is concentrated around Loch Lomond, but there are parts that stretch into the Trossachs and the eastern parts of the National Park. The Estate is in varying condition; some of it has undergone recent refurbishment, and some is in need of investment.

4.4. Operationally, our Estates Team manages our Estate working closely with others in the organisation (for example, the Ranger service). It is

one of our largest teams, made up of 19 FTEs and has a breadth of responsibilities ranging from ensuring the health and safety of our properties, managing our legal tenure (alongside our Legal Team), keeping sites in a good operational state, collecting revenue, managing contractors, and investing in and upgrading our property. Our Estates team also manages our road vehicle fleet, which will be the subject of a forthcoming Fleet Strategy currently in development.

- 4.5. As well as its responsibilities in its capacity as a landowner/land manager, the National Park Authority in its capacity as an Access Authority has funded, installed, repaired, maintained or otherwise managed and promoted access routes/infrastructure for much of which there is no formal property asset management arrangement in place. This generally tends to be non-vehicular routes such as paths and promoted cycle routes, often Core Paths, where the landowners/land managers do not carry out works necessary to keep these routes open, and they do not form part of the National Park Estate. In terms of the Land Reform (Scotland) Act 2003, it is the duty of the access authority to assert, protect and keep open and free from obstruction or encroachment any route, waterway or other means by which access rights may reasonably be exercised (Section 13) and we have certain powers under sections 15, 19 and 26. Under the provisions of Section 13 we may choose to intervene to carry out works to keep paths open and free from obstruction.

## 5. Strategic Context

- 5.1. Developing and agreeing an Estates Strategy will help us ensure we are developing and managing our Estate in a consistent way that is helping to further the broader goals of the National Park Authority. It should make decision-making clearer and easier, ensure resources are targeted
- 5.2. at the correct priorities, and support positive change for the National Park.
- 5.3. The strategy is set within the broader strategic context of our draft National Park Partnership Plan 2024-2029, as well as other strategic programmes such as our Mission Zero plan and the Place Programme.

The draft National Park Partnership Plan 2024-2029 that is currently out for consultation establishes that the scale and urgency of the nature and climate crises will drive our priorities, and that we will bring everyone who lives and works in the National Park or visits it with us. There are many ways that the NPA Estate can help contribute to these priorities, and our proposed Estates Strategy sets these out, such as developing nature restoration plans for all of our land holdings, and considering how

NPA piers and pontoons can become more sustainable for long term water transport provision. Our Mission Zero plan is directly related to our Estate, as much of our direct and indirect emissions stem from it. The plan for the NPA to be net zero by 2030 is already established, and the Estates Strategy needs to respond to this.

5.4. The Place Programme is a vision for the NPA and its partners to invest in higher quality visitor facilities throughout the National Park (including but also going beyond NPA sites). This must be supported by the Estates Strategy, which is about how we use and manage our Estate, including to help achieve the Place Programme vision. The Place Programme is visitor-facing and primarily about improvements and investment, whilst the Estates strategy covers management of our properties and helps guide decisions related to the Place Programme such as acquisition, disposal, and revenue raising.

5.5. It should be noted that the strategy will also need to respond to work going on across the Scottish Government and its environmental public bodies to work collectively to discover opportunities for new value in service delivery in response a range of national drivers for change. The proposed Environment Public Service Review will focus initially identifying potential collaborative efficiencies. The key aims of this transformation programme are to ensure public services remain fiscally sustainable; support improved outcomes; and support reduced inequalities of outcome among communities in Scotland. Initial discovery work is underway to consider where savings, improved performance and improved service can be achieved by working together (e.g. estates, assets, audit, HR, finance, procurement and digital). As part of this a collective review of assets and accommodation is underway and this could result in opportunities to share existing or new assets with partner organisations operating within the National Park. Post-pandemic ways of working mean that a number of public bodies now occupy underused buildings. Members will be aware that Carrochan already hosts staff from a number of partner organisations. The National Park Authority will continue to seek opportunities to seek efficiencies where shared use of assets can provide benefit.

6.1.

## **6. Strategic Objectives for our Estate**

In establishing our Estates Strategy, we need to consider what we want from our Estate. The proposed Strategy is built around three key strategic Estate functions. There is overlap between each of these, but they are distinct enough functions that help us consider the actions and

objectives we want to take forward through the Estates Strategy. Below we explain each strategic area, as well as the proposed objectives and early priority actions we want to achieve by 2030 under each heading.

**Strategic Objective 1. To Enable Efficient National Park Authority Operations**

Our Estate is central to ensuring the NPA can carry out its functions. It provides the premises for our staff to work, for our Board to meet, and for stakeholders to engage. Managed well, our Estate can underpin and catalyse the performance of the whole organisation.

6.2.

<p><b>Objectives by 2030:</b></p> <ul style="list-style-type: none"> <li>- Our workplaces are strategically located and fit for a flexible and hybrid working environment; support the wellbeing and welfare of our staff; and support staff in achieving net zero</li> <li>- Use of space in offices and operational bases is maximised</li> </ul>	<p><b>Early Priority actions:</b></p> <ul style="list-style-type: none"> <li>• Rationalise the use of Carrochan, expanding the sharing of space with other bodies and considering the balance of meeting space vs desk space needs</li> <li>• Implement the Mission Zero infrastructure plan, and invest/design to support low carbon commuting and behaviours</li> <li>• Reconfigure and invest in the Units in Alexandria to better serve our operational and storage needs and provide better staff welfare and working facilities</li> <li>• Identify new fit-for-purpose operational / office space serving Trossachs &amp; Breadalbane to replace the existing Callander and Lochearnhead offices</li> <li>• Re-design the Duncan Mills Memorial Slipway site to better serve operations and stakeholders</li> </ul>
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## Strategic Objective 2. To Support National Park Strategic Priorities

Like everything we do, the Estate must exist to further the strategic aims of the National Park. As we build towards the new National Park Partnership Plan 2024-2029 we need to consider how the Estate can help us achieve the Plan's priorities.

6.3.

<p><b>Objectives by 2030:</b></p> <ul style="list-style-type: none"><li>• NPA sites are managed and invested in to support restoring nature and connecting people with it</li><li>• NPA assets enable a sustainable, inclusive, low carbon destination through the multi-year Place Programme, our role in visitor hubs, the recreational path network, and water recreation</li></ul>	<p><b>Early Priority actions:</b></p> <ul style="list-style-type: none"><li>• Develop and implement site-specific nature recovery plans for our land holdings, and explore new ways to use our estate to better connect people with nature</li><li>• Update the management plan for Inchcailloch and invest in it to support engagement with nature</li><li>• Invest in priority NPA visitor sites through the Place Programme, enabling sustainable, low carbon visiting and transport modal shift</li><li>• Implement renewables and emission reduction infrastructure at NPA sites through our Mission Zero plan to achieve net zero by 2030</li><li>• Consider an investment case for replacement of aging NPA piers and pontoons with more enduring materials that enable long term water transport provision and support water safety</li><li>• Establish a framework for the temporary acquisition of derelict and neglected sites to support the Living Well Locally objectives of the (draft) National Park</li></ul>
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**Strategic Objective 3. To Deliver Quality Provision for Visitors & Communities**

A large portion of our Estate is outward facing, and supports long-standing visitor and community needs. As use of our sites change over time, and as factors like climate change impact them, we need to proactively respond to ensure the sites remain safe and provide a quality user experience.

6.4.

<p><b>Objectives by 2030</b></p> <ul style="list-style-type: none"> <li>• NPA assets are maintained and invested in to continue a safe, compliant and quality experience for users</li> <li>• Sites respond to emerging visitor patterns and external impacts such as climate adaptation</li> <li>• Resource is effectively allocated including through targeted divestment and revenue raising</li> </ul>	<p><b>Early Priority actions</b></p> <ul style="list-style-type: none"> <li>• Implement a best practice approach to achieve good standards of repair and maintenance, to take us beyond basic compliance and Health &amp; Safety standards, including on Estate parts of the recreational path network</li> <li>• Use engagement with diverse groups including young people, ethnic groups, and people with disabilities to ensure our sites support their needs</li> <li>• Create and implement a climate change adaptation plan for NPA property</li> <li>• Divest of sites that no longer support NPA strategic priorities, working with communities to support any interests they may have in these sites</li> <li>• Rationalise ownership and management responsibilities across the public Estate to realise efficiencies and joined-up working with other public bodies</li> <li>• Where practicable, implement revenue raising arrangements such as donations, rental charges, or user fees that contribute to the recovery of the costs of service provision</li> </ul>
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Together, these strategic priorities represent what we want our Estate for, and the direction we want it to head in the coming period. In the context of our Estate and NPA resources, the actions are ambitious aim to make a step change in each of the three key strategic areas.

6.5.

## 7. Implementation principles

7.1. As we look to achieve the strategic priorities outlined above, we also aim to establish a number of principles that will help guide our decision-making in the future as we implement the strategy. These are important considerations which will also guide decisions on the investment in and management of the Estate.

### Acquisition and Disposal Principles

7.1. From time to time we may acquire or dispose of property, including where time-limited lease or maintenance arrangements are used. For the most part the Estates Strategy is not explicitly listing each property we may seek in the future to acquire or dispose of, though there are some areas noted in the list of actions above. However, it is important that we recognise that acquisition or disposal may be in the best interests of the achieving our priorities for the National Park and that having some parameters agreed to guide our consideration of such transactions will help our future decision-making.

7.2.

In **acquiring** property, we will use the following principles:

- Property may be acquired where an investment case clearly establishes how NPA ownership of the property would help achieve National Park aims and NPPP outcomes
- The acquisition should align with the Scottish Government investment hierarchy and other (eg Scottish Public Finance Manual) requirements
- The NPA is assessed by the body best placed and most likely to achieve the desired outcome
- There should be a clear and specific management and use plan in place, including resource allocated to undertake ongoing maintenance and development (as appropriate)
- In some cases acquisition may be temporary, as a vehicle to enable future ownership by a third party for development or use
- For long-term use, ownership is preferred over rental



In **disposing** of property, we will use the following principles:

- NPA property may be disposed of where it no longer directly supports the three objectives of this Estates strategy
- 7.3. • Disposal will follow all relevant Scottish Government guidelines and requirements
- Where possible the NPA will aim to ensure that the disposal results in positive outcomes for interested communities and stakeholders
- Disposal will be prioritised based on properties where NPA ownership or servicing costs are high (net of income generation potential), or disposal helps achieve NPPP outcomes

### Estates Management Principles

In **managing** our property assets, we will use the following principles:

- 7.4. • NPA property will be managed to meet all legislative requirements with staff and public Health and Safety as the priority
- We will establish minimum standards for asset care and maintenance that exceed this baseline position
- We will establish what good looks like and put in place a plan to move from achieving the baseline and minimum standards to achieving good standards across our estate
- We will only continue to operate sites if we are confident they are in a safe and compliant state
- We will continue to improve our procedures to help us meet the standards we set and use smart reporting tools to demonstrate performance and guide decision-making
- 7.5. • We will continue to invest in the digitisation of our estates management systems and use of external experts where specialist advice is required

### Cost Recovery Principles

Owning, maintaining, and updating sites incurs ongoing and one-off costs. Costs are varied and include (but are not limited to) cleaning, vegetation management, wear and tear, repairs and replacement, signage, theft/vandalism, energy and other services, rates, and litter and waste management.

These costs will depend on the type of infrastructure. For example, a timber pier will incur high and irregular repair costs, but minimal monthly running costs whereas public toilets will incur regular and ongoing costs.

7.6. We already have some user charges at our sites, for example for car parking, toilet use, slipway use, or commercial operations on our piers and pontoons, amongst others.

7.7. As a principle, we are now taking a clear position that we will seek to recover service delivery costs from users of our sites where practicable and effective to do so.

7.8. We consider revenue raising to be distinct from commercialisation. We are not a commercial organisation and there are only a handful of circumstances where it is beneficial to provide a commercial offering at our sites. In these circumstances, a commercial offering must benefit both users as well as the National Park Authority. For example, The Cabin at Loch Lubnaig provides a positive visitor experience whilst removing the NPA's costly maintenance and running costs at a site that is disconnected from our other properties (eg Loch Lomond).

7.10. In contrast, limited revenue raising at sites can help offset the costs associated with running and maintaining sites.

7.11. In setting and reviewing charges, we will take into consideration a number of factors. These include market comparisons, cost comparisons, user patterns and impacts, equalities impacts, economic and service impacts (including transport modal shift), and our legal tenure.

7.12.

Taking this approach to cost recovery ensures we have the revenue necessary to provide good quality services at our sites, whilst recognising that charges need to be set thoughtfully and carefully in order to achieve the right balance between service provision, operations, and income.

8.1.

## 8. Off-Estate infrastructure

There is infrastructure throughout the National Park that the NPA does not have formal ownership or management of (i.e. legal tenure) but we may decide it is appropriate – at our discretion – to use our resources to intervene in the wider interest of the National Park. This includes infrastructure that:

(a) we have a strategic interest in, or

(b) It facilitates delivery of our statutory duties (eg as a Access Authority), or

(c) we have a role in its use or historic development/maintenance.

The main examples of this activity include:

**Camping permit areas:** providing site condition monitoring, vegetation and litter/waste management at camping permit areas where the landowner does not undertake these activities.

8.2.

**Core paths and strategic routes** (e.g. WHW): using our Access Authority powers we may actively intervene to ensure access is maintained. This includes using our resource and capital budget to replace derelict / unsafe infrastructure (e.g. bridges), without which access would be impeded.

**Historic visitor experience infrastructure:** we will maintain infrastructure we have historically placed in the National Park on non-NPA land for the purpose of enhancing the visitor experience. Examples include the threshold signs at National Park entrances, scenic routes infrastructure and other visitor signage.

8.3.

In all cases, there must be Executive-level approval including documentation and consideration of:

- the activities we will carry out and rationale for doing so, along with capacity under which we carry these out
- budget and resource identification and prioritisation
- risks, including legal, reputational, operational, financial, environmental, and public

8.4.

- explicit agreement on implications of any new burdens or liabilities and how these will be managed and resourced

Except where the NPA has existing legal risk, we will have a presumption against taking a formal asset management role on infrastructure that is not part of our Estate. This would not necessarily preclude more minor maintenance tasks off-Estate either by our own staff or through volunteering activity that we co-ordinate.

- If we consider the infrastructure requires formal and ongoing management by the NPA over the medium to long term, we should consider acquiring formal management or acquisition of it.

- Notwithstanding this point, we are separately considering preparing a path monitoring plan and process for key non-NPA managed routes in the National Park, to be resourced by staff and volunteers. The considerations, risks and benefits of such a plan will be taken into account in its preparation and agreement.

Once we have decided to intervene in off-Estate infrastructure, the task or activity will be prioritised using similar criteria to on-Estate work.

### Hierarchy of Engagement & Intervention

- 8.5. When we intervene on Off-Estate infrastructure, our relationship and engagement with the relevant land owners / land manager is key. In carrying this out there is a hierarchy of engagement and intervention that
- 8.6. we should follow:

#### **1. Influence the landowner to lead on the activity**

- This is always the preferred route but we recognise there can be non-alignment of incentives and resources

#### **2. Seek explicit landowner permission for the NPA to do the activity** (except where legislation specifies that express landowner permission is not required, liaise with the landowner)

- Where permission is granted this should be documented including the activities to be carried out and clarifying any ongoing liability for either party (if relevant, requires Exec approval)

#### **3. Use Access Authority powers for the NPA to carry out the activity**

- We will inform the landowner in writing of the activities we will be carrying out and the basis for doing so, also documenting any ongoing liability for either party

#### **4. Acquire legal tenure for the land**

- Where Access Authority powers may not apply but there remains an overarching interest, we may seek to acquire legal tenure to have control over the land through mutual agreement or using CPO powers

## 9. Risk

Estates investment features in our corporate risk register, recognising that failure to invest in our Estate could lead to a sub-standard visitor experience, health and safety risks, higher management costs, sub-optimal income, and increased user complaints. This strategy helps address this risk by steering our investment towards the key goals our Estate needs to achieve.

9.1.

Implementing the strategy carries resource risk, as there are a considerable number of actions, some of which require dedicated and long-term resource in order to complete. By working across the organisation, this risk can be partly mitigated as there are collaboration benefits and opportunities that can achieve multiple outcomes for the NPA.

9.2.

The principles related to disposal of properties and cost recovery carry potential reputational risk. This risk can be partially mitigated by developing clear stakeholder and community engagement plans that communicate our thinking early and transparently.

9.3.

## 10. Next steps

10.1.

If this Estates Strategy is approved then the next step will be finalising it with any suggested amendments, publishing the document, and commencing its implementation. This includes the development of accompanying policies and plans to provide a framework for delivering actions in line with the principles of the strategy.

## Appendix 1 – Estates Strategy slides

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