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**THE LANDMARK TRUST
STRATEGIC PLAN
2020-2025**

Targets for 2024



2025 OBJECTIVES AND ANNUAL TARGETS FOR 2024

Strategic themes 2020-5

- Weathering the international **Covid-19** pandemic.
- Putting in place **systems and infrastructure** that will ensure Landmark can continue to work as it grows.
- Importance of **capturing and codifying what we do**, to allow us to manage change and succession and enable growth.
- Intensifying focus on our distinctiveness, '**the Landmark difference**', internally and externally.
- Exploring further opportunities to **increase income while keeping prices as low** as we reasonably can.
- Seeking to engage with harder to reach groups through projects and other engagement activities and **fostering diversity within our charity**.
- Being demonstrably **environmentally responsible** in our work.
- Harnessing the **potential of our staff**.

1. Safeguard our beautiful and fragile environment through rescuing and caring for rare and remarkable historic places in the UK

2025 OBJECTIVES

- a) Implement an ambitious and effective programme of rescuing outstanding heritage at risk in the United Kingdom, informed by our identified priority building types.
- b) Complete Quinquennial Surveys of all our buildings and agree long term plans for their maintenance.
- c) Undertake annual programmes of repair and maintenance that improve the condition of our buildings, and work to codify the Landmark approach to building repair and adaption.
- d) Develop and implement an ambitious plan for reducing the Carbon footprint of the Landmark Trust.
- e) Establish affordable maintenance regimes for all gardens and wider landscapes.
- f) Manage Lundy's natural and historic environment in partnership with the National Trust achieving standards agreed with Natural England and other bodies.
- g) Embed craft training in all Landmark's major building projects and implement Landmark's Craft Skills Strategy.

Targets for 2024

Complete the restorations of Station Agent's House and Calverley Old Hall, maximising the impact of each launch for engagement and publicity.

Develop our project to restore RAF Ibsley Watch Office, achieving planning and G3, starting on site and concluding the fundraising appeal.

Achieve a £5m NHMF grant award to acquire and repair Mavisbank, implement according to the programme, including raising partnership funds and developing a bid to NLHF for Phase Two.

Develop a new Landmark project (either Weymss Bay or Wentworth Woodhouse) beyond Gateway 2a and begin fundraising.

Undertake a £3.3m programme of maintenance and repair work across our estate informed by our programme of Quinquennial Surveys.

Install new renewable energy systems at the Grange, Wortham Manor and Stockwell Farm and develop green energy strategies for Tixall Gatehouse and Lower Porthmeor for implementation in 2025.

Issue the Building Design Guide in January 2024, and develop content to cover the let estate, Italian properties and the new fire safety strategy.

Implement the Gardens and Landscape policy, agreeing a programme to complete plans for all sites, and draw on external advice to review current maintenance and management arrangements.

Draw up a new HLS plan for Lundy in partnership with the National Trust, Natural England & Historic England.

Secure DEFRA funds administered by Historic England for repair work to Lundy's scheduled ancient monuments.

Complete landscaping and stabilisation works to St John's Valley on Lundy.

In partnership with the NT, replace Lundy's aged power control system and support the development of the green energy project for implementation in 2025.

Implement year three of the Environmental Sustainability Plan.

2. Ensure we are financially and operationally sustainable for the long term

2025 OBJECTIVES

- a) Achieve at least 85% average occupancy across all Landmarks.
- b) Balance income generation and affordability, achieving budgeted income while keeping prices as low as we can and developing mitigations for downturns.
- c) Develop a robust model and strategy for the maintenance and development of our Legacy Estate, maximising this as a long-term source of income.
- d) Refine our pricing model and introduce new measures to manage price adjustments in response to booking patterns.
- e) Improve the financial and operational sustainability of Lundy, by pursuing the Lundy Company's long-term viability plan and close working with the National Trust.
- f) Develop and establish robust financial systems and processes for growth.
- g) Review Landmark's financial model in the light of a better understanding of maintenance and operating costs.
- h) Building on work undertaken during Covid-19 pandemic, establish Landmark within the holiday sector, nurturing relationships with sector bodies in the UK and in the devolved nations.

Targets for 2024

Achieve letting income of £11.9m, budgeted figures for other income, and achieve at least 83% occupancy.

Implement a new late-availability discount strategy to generate £150k of additional revenue and implement other initiatives to maximise income.

Achieve £70,000 in fundraising income for Lundy.

Operate the first year of online MS Oldenburg tickets and develop a plan for online ticketing for staying Lundy visitors.

Implement a new Purchase Order system for use across Landmark.

Embed the agreed approach to internal audit ensuring regulatory compliance and conformity with our procedures.

Review the Quinquennial Surveys for the Let Estate and identify needs and options by Q2.

Review our processes for the Let Estate to ensure that we are getting best value in including in major refurbishments following Landmark project processes.

Develop a long-term strategy for our CRM and financial systems, review and document a proposal for changes and enhancements by end of Q3.

Enhance our cyber security defences by implementing internal and external penetration tests by end of Q1 and enabling Microsoft endpoint security by end year end.

3. Raise our profile and attract more supporters to our cause

2025 OBJECTIVES

- a) Make Landmark's distinctive mission more vivid and visible to supporters, bookers and stakeholders, sharing our work, stories and expertise in new ways.
- b) Enhance our understanding of our customers and supporters through effective CRM and data analysis, integrating systems and developing a single view of the customer.
- c) Review our supporter schemes, setting out and implementing a plan for their development over the planned period.
- d) Attract and retain more customers and devise a strategy to galvanise customer loyalty.
- e) Grow our legacy supporter group by encouraging others to remember Landmark in their Will, and tell us if they have, adding 150 new 'legacy pledgers' over the plan period.
- f) Harness new media and technology to trial new approaches to fundraising.

Targets for 2024

Implement a plan to improve dynamic reporting by integrating third-party data (Feefo, survey monkey, wisepops, eventbrite and email registrations) into CRM processes and developing live management and departmental dashboards.

Establish a strategy to attract new bookers, increasing the numbers of new bookers by 4% to 44%.

Grow our legacy supporter group by 25 new pledgers, towards the overall SP target of 150.

Launch two new supporter schemes for Lundy: the Lundy Friends and the Marisco Club.

Deliver planned changes to the Landmark Friends and Patron schemes to reduce VAT and meet HMRC rules with an increase to year-on-year net unrestricted income.

Review Gift Aid processes and solutions to increase net revenue from unclaimed Gift Aid.

Carry out a User Experience review of the supporter schemes offering on the web to identify improvements, including implementing a guest checkout option for single gifts online.

4. Make the experience of Landmark as wonderful as possible for everyone

2025 OBJECTIVES

- a) Clearly define the distinctive qualities of the Landmark experience and amplify these with all our users.
- b) Ensure all interactions, digital or analogue, with Landmark meet or exceed Customer Expectations.
- c) Make the customer experience absolutely central to all our thinking, developing ways of working that embed this more deeply within the organisation.
- d) Develop a series of adventurous engagement programmes reflecting wider themes in society which bring new audiences to Landmark's work.
- e) Make Landmark demonstrably more diverse and inclusive.
- f) Ensure that our buildings are equipped and appointed for an outstanding Landmark experience, increasing the percentage of customers rating our facilities as 'Good' or 'Excellent' in the post stay review.
- g) Undertake major schemes of repair and renovation on the Saddell and Lower Porthmeor estates encompassing significant customer improvements and far greater environmental sustainability.
- h) Implement a programme of improvements to Landmarks' facilities and interiors each year including agreeing and implementing an approach to physical access improvements and access statements.

Targets for 2024

Complete year 3 of digital customer experience project, including new home page, property pages and calendar, promotional codes, 'available from' prices and upgrading the content management system.

Achieve a Net Promoter Score above 95% and exceed 2022's operational Survey Monkey scores, embedding dashboards, consistency, customer-centricity and efficiency into the visitor services function.

Establish the furnishings operations manager and processes across regions for existing Landmarks and improve furnishings-related customer survey scores by 3%.

Develop a new engagement strategy informed by Landmark's diversity and inclusion strategy for approval by trustees.

Share Landmark with as many people as possible, hosting 57,000 guests, 19,000 visitors on open days and through engagement programmes and growing public awareness to 12%.

Draw up three-year maintenance plans for all Landmark by regions, working to include operational and furnishings issues, and drawing on QIs, Joint Annual Inspections and customer feedback.

Complete the first part of the major refurbishment of Saddell Castle on budget and schedule.

Develop a major upgrade at Captain's House to create an operational and customer hub, improve the accommodation and put two properties in Lower Porthmeor onto renewable energy.

Undertake a programme of property upgrades, to include Tixall Gatehouse, Loughton Place and Wortham Manor.

Establish a cross departmental team to develop an approach to connectivity in Landmarks, including a pilot of Wi-Fi at a sample of properties.

Devise a future approach to the accessibility of Landmarks, drawing on recent work at Calverley Old Hall and other projects.

5. Develop a dynamic and engaged team equipped to do their jobs within a well governed Charity

2025 YEAR OBJECTIVES

- a) Ensuring we meet all H&S requirements in our work, across Landmark and Lundy.
- b) Articulate and amplify the distinctive qualities of the Landmark experience with our staff.
- c) Ensure our structures and staff at all levels are empowered, resourced, and equipped to do their jobs as our estate grows.
- d) Draw up and implement a plan to further develop and motivate our staff.
- e) Codify and systematise our practices, working to ensure succession is considered in all key areas.
- f) Building on communication channels established during the pandemic to build greater organisational cohesion.
- g) Ensure the Landmark Trust is well governed in word and deed.

Targets for 2024

Roll out the new fire safety strategy to all relevant staff.

Ensure staff awareness of the latest H&S regulations (asbestos, CDM) and review asbestos and agricultural safety management on Lundy.

Devise and implement a succession plan for the furnishings consultant role.

Review the terms of employment and associated benefits for our Housekeepers to determine whether they are fit for purpose and sustainable in the long term; with any proposed changes being prepared for implementation in 2025.

Develop a TEAMS strategy to facilitate virtual working and enhance Landmark's efficiency.

Convene a dynamic Landmark data management team, define roles and responsibilities Q1, provide identified training Q2 and establish departmental dashboards.

Develop and implement a bespoke training programme for key senior and middle managers in Landmark.

Implement the Staff Survey Action Plan.