



# Forward Plan

2022 to 2025







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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.

The last couple of years of Covid has taught us how important it is to have a multi faceted business and that we must always be flexible to changing circumstances. The various departments of the estate have to support one another as government policy is still emerging in a post Brexit, post Covid world. There is a great emphasis in this plan on the environment, including plans to adapt our farming practices, plant large scale native woodlands, restore peatland and improve the energy consumption of our properties. We also aim to improve our offerings to our visitors and guests, starting with a new website and branding. Visitors at the castle and caravan park will have better food and retail options and we will continue to see standards improve at our holiday accommodation. Much of this plan is about continuing to raise the bar whilst not forgetting who we are and what we do well.

Numerous jobs and developments will take place on the estate, some planned others inevitably unforeseen, these will be tackled on a case by case basis with due consideration for the guiding principles explained in this document. The plan covering the three years from 2022 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 and supervisors 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 we do on the estate. I would also like to thank everyone who works on the estate and makes the realisation of this plan possible. The estate is committed to openly discussing current and future plans. Communication is a two way process and we are open to suggestions or questions where something is not clear. The door is always open.

Robert Troughton  
Resident Trustee

# Policy Statements

## Blair Charitable Trust

The trustees are Robert Troughton (chair), Sarah Troughton, Charles Kinnoull 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 adherence to good conservation practices, awareness of and adaption to any changes Brexit may bring.
- 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. Building the brand around an authentic product is key to our aims

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.

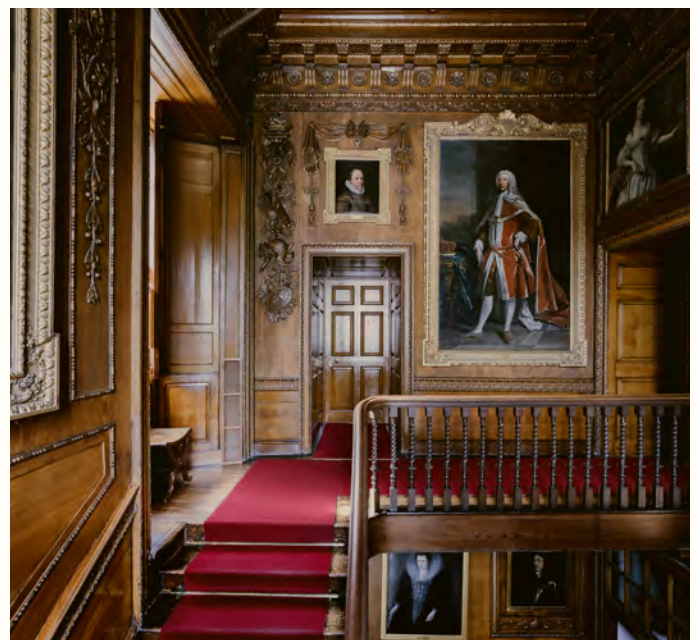
## Family Estate

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 place priority on the delivery of social and environmental benefits as part of our business objectives and we commit to operating in an open and transparent way.







# Heritage & Education

A. Blair Castle

B. The Archives

C. Atholl Estates Ranger Service

## A. Blair Castle

The castle's external repair is overseen by an appointed architect, Jonathan Gotelee, who is an expert in the repair and conservation of Listed buildings. In 2017, Jonathan prepared a 30 Year Forward Outlook for Blair Castle which serves as a guide for ongoing works.

In the last assessment of the Forward Outlook, it was suggested South Wing work was the most immediately pressing. Since then, the South Wing works have picked up many of the items considered most urgent and the hope is this work is completed by the end of 2022.

Castle external redecoration is scheduled for Summer 2024 and 2025, though the west side could be significantly reduced in quantity or delayed due to its better condition compared to the North and East elevations. Tests are ongoing on masonry paint specifications and additional cover flashings to reduce staining of the walls from exposed masonry such as crows feet and window cills but it remains too early to determine what benefits might be achieved from this. More will be known for inclusion in the next Forward Plan.

The next area of the castle most urgently needing work is the valley gutter, East slate pitch and gable, all North of Baron Maule's Room (area II on the roof plan in the Forward Outlook report).

Following this, the valley gutter at the Library in the South cross wing (shown as IV on the Forward Outlook report) and junction with the high block are also needing work. This is a smaller albeit difficult to access area. But insulation in the roof spaces here, above the offices, is on the agenda.

It is then a matter to re-assess either:

- a. the Comyn's Tower Parapet work (III on the plan)
- b. The Entrance Hall Tower roofs (V on the plan)
- c. The Ballroom Roof edges (VI on the plan)
- d. The Shop area Lead flat roofs (VII on the plan)

For their urgency, b and d are primary but all have a good reason for consideration.





## B. The Archives

The Archive and Castle collections provide an identity, memory and heritage of the estate. The archives provide a useful and truthful narrative of background knowledge that informs much of the presentation of the castle and its collection. Although the records of the estate were initially preserved to support the family and business, today, they are in demand for so much more.

The collections are a rich resource which can be utilised for future developments, such as exhibitions, genealogical and heritage tourism.

Specifically:

Archive and Castle Collections Plan:

- Implement a new archive cataloguing database to improve and continue ease of access for staff and researchers.
- Continue with yearly 'pop-up exhibitions' on various relevant and timely themes, drawing on both the castle and archive collections.
- Monitor environments in both the Castle and Archives to ensure the collections are housed in a suitable environment to promote long-term preservation.
- Co-ordinate with conservation specialists for repair and conservation of specific artefacts and documents. Supervise and manage the conservation budget as well as any transportation or loans of artefacts.
- Oversee the castle tours, while ensuring the stories are as historically correct as possible and provide specialised tours on specific collections.

Estate Collections Plan:

- Continue to provide talks and outreach into the local community to maintain and build on community relations.
- Provide advice and management of our current and historic digital records throughout these record's lifecycle.
- Keep up to date with modern and archive record keeping practices through the professional Archive and Museum associations.
- Deliver access to records modern and archived for estate related enquiries.
- specialists for repair and conservation of specific artefacts and documents. Supervise and manage the conservation budget as well as any transportation or loans of artefacts.
- Oversee the castle tours, while ensuring the stories are as historically correct as possible and provide specialised tours on specific collections.





## C. Ranger Service

The service will continue to be run in partnership with Cairngorms National Park Authority with the primary objectives of enhancing outdoor leisure experience on Atholl and providing opportunities for raising awareness and knowledge of the natural environment of Highland Perthshire. The service will run with one permanent senior ranger and a fixed term placement for a junior ranger. In addition to delivering the core functions and roles of an embedded ranger service, we shall focus on the following during the period of this plan:

- Increase our work with volunteers. We will work with Volunteer Cairngorms to embed at least 12 supervised volunteer ranger sessions per year with more reliable attendance derived from increased recognition and provision of benefits
- Establish and pilot opportunities for volunteer rangers to undertake unsupervised sessions by allocation of specific tasks and routes
- In support of the community of Blair Atholl, we will work with The Atholl Glens Committee (Blair Atholl region community, tourism and business group) initially to develop their Green Plan
- Continue to tackle public impacts in partnership with Police Scotland, SFRS, PKC, NatureScot through reduction in the negative impacts of dirty campers by fewer fires, less litter and fewer incidents notifiable to Police Scotland using 2021 as a baseline
- Integrating public access with the operations of our rural departments, addressing access issues where key flash points develop
- Increasing information available digitally via social media and web portals by working with established and leading public access platforms relevant to Highland Perthshire
- Addressing areas of infrastructure needing repair over the next three years.
- Falls of Bruar west path section
  - Steps along Tilt riverside (put in new steps at lade end)
  - Establish a new red squirrel trail, leading from Glen Tilt car park, that's disabled access friendly
- Investing in a refresh of what information is provided at the visitor centre in Blair Atholl and how it's presented, so it once again becomes an essential stop-off point for those using the area as a destination for leisure and activity







# Finance



# Finance

The finance team will continue to develop its service to the estate enterprises with focus on the following:

Re-establish reserves sufficient to deal with financial shocks and ensure best use of cash held.

- Consider use of excess funds within all entities managed and investment approach where long term surplus exists or expected.
- Rationalise bank accounts operated to ensure efficient use of cash where it is held.
- Where appropriate ensure budget surplus is achieved and invested for long term management.

Establish financial reporting and control processes that allow for co-operation of departments driving towards one goal, whilst retaining financial accountability and ownership.

- Ensure timely, accurate and meaningful information is provided to Trustees, owners and relevant team managers on a routine basis.
- Work alongside team managers and all staff to build understanding of financial information, providing time and training for this.
- Ensure feedback loops exist where input errors are identified to reduce “rubbish in, rubbish out” impact on processes particularly in relation to Zahara invoicing system.
- Ensure shared understanding of estate financial performance and key estate financial goals.

Work towards each operating department becoming financially independently profitable.

Build transparency around financial information and outcomes both within and across departments

- Ensure financial information is accessible to relevant individuals across the Estate and understood.

Integrate further the operating systems to ensure one version of the truth and near real-time information for decision making (in key areas)

- Review integration of EPOS systems and finance system
- Develop clarity around the reporting structure in Tor and ensure financial system is reconciled back to this.
- Review possible integration of Works operating system and finance system to capture timesheets and stock information
- Consider use of business intelligence software to bring together, model and analyse data from various sales, operating and financial systems

Provide greater business insight and intelligence beyond purely financial outcomes

- Ensure reporting is available on the key drivers behind financial outcomes and where relevant long-term trends and market comparisons
- Continual and where appropriate automated reporting back out to teams

Build resilience within the finance team for the future

- Recruit and train a team member through professional accountancy qualifications
- Ensure a modern, flexible working environment adapting to the needs of the business and the team
- Ensure all documents are stored electronically and not reliant on individual PCs
- Document key processes

Review key accounts and providers to ensure value is being provided

- Review payment providers and platforms for effectiveness and cost
- Key account procurement review



# Tourism

A. Sales

B. Marketing

C. Castle Exhibition and Events

D. Retail

E. Castle Gardens

F. Blair Castle Caravan Park

G. Holiday Accommodation

H. Events



## A. Sales

The key objectives from sales, in collaboration with marketing, under this plan will be to return castle visitor numbers and events to pre pandemic levels, lever growth in accommodation occupancy in all self-catered properties and grow our calendar of events on the estate, including smaller scale private functions at venues like Clachan.

Our main focus will be in the following areas:

Trade shows and networking:

- Engage with the Travel trade, DMC and association market to ensure that Blair Castle is the destination of choice for groups. Attend trade shows to maximise exposure to these audiences to include: Visit Scotland Expo, WTM, destination workshops and UKinbound events.
- Host two fam-trips per year through working with partners such as Visit Cairngorms, Visit Scotland and UKinbound.

Staff Training:

- We will continue to invest in our sales workforce through a range of courses that will enhance confidence in customer service and upselling.

- Invest in consistent customer reviews to ensure we are keeping up to the 5\* Visit Scotland standards and identify other training areas.
- Managers to attend 2 x industry training days per year through Visit Scotland, ASVA, UKinbound and other vendors. Front line staff involved in sales and upselling to benefit from structured training throughout the year to provide confidence and ability.

Performance tracking and targets:

- Timely sales targets will be issued annually across sales teams on the estate and monitored monthly against actual. Targets will be achievable but challenging, seeking to exceed budget in all circumstances. Support and early intervention will be applied where teams are struggling to meet or exceed their targets. Key targets by the end of the plan period:
  - Return castle visitor numbers to pre-pandemic levels
  - Grow Highland Lodge occupancy to 80% over the portfolio
  - Grow BCCP occupancy levels to over 85% over the 5 revenue streams





## Benchmarks and data analysis:

- We will continue to use sector benchmarking to ensure we track our performance against peer metrics and over this plan we will seek to ensure that all enterprises are externally benchmarking.
- In collaboration with finance, we shall specifically develop better systems to evaluate sales performance from the various pitch types and accommodation at the caravan park, thereby informing investment opportunities.
- Dynamic pricing over shoulder months will be trialled for our self-catering properties, through the facility of our new booking EPOS system.
- We aim to deliver two new events within the Castle paid grounds and establish these as part of our annual events calendar and two new major estate events per annum by the end of 2025.

## Filming:

- There has been an increase in film location contracts on the estate over the last five years and there is opportunity for this to further grow. To deliver this we need to further build networks with location managers and find new ways to promote our significant and diverse range of locations to the Scottish and UK filming agencies.

## Estate Events

- Our intention is to make Atholl a key destination in Scotland for tourism events that are in keeping with our brand and values that have cultural merit and have the potential to be profit making. We will build on existing events to bring in larger entry numbers and extending duration to promote room nights in our accommodation.
- Smaller weekend events are possible to host but to deliver this we need to invest in infrastructure at our main events site, Target Park, including access, power, water and drainage points, which then enables small events to be hosted viably for us and the organiser.





## B. Marketing

The overarching objective for our team is to support each department to achieve their sales targets. During this plan, a key objective is also to streamline the entire marketing activity, understanding why each activity is undertaken, what audience we are talking to, what business objective it fulfils and what return it will provide. Detailed below are the key areas we shall focus on:

- The new brand rollout has been developed to encompass our values and personality and reflects what people - both inside and outside the company - use to form their opinion of us. The brand guidelines will ensure all communications throughout the estate are consistent and in line with our brand values.
- We will conduct a customer journey review for each department across the estate covering all touch points from search through to departure which will allow us to check for consistency and messaging.
- Continuing to push for online engagement is better for the environment and cheaper as well as what our customers are wanting. The consistent key message will be to book on line for tickets, lodges and accommodation.
- Our new website will launch in March 2022 with the integration of Horse Trials to follow in 2023. The new site has been built to improve the user experience and ensure it is easy for the user to find what they are looking for and book. SEO and Google campaigns will run to drive traffic to the site to meet targets set in each financial year.
- Email marketing will be fed from existing customer databases, cleaned and GDPR compliant and supplemented each month from our EPOS booking and ticketing systems. The combined customer database is currently at 27,500 and our target is to grow that by 10% each year.
- Social media campaign success will be determined by the engagement level of each post and content will be curated to ensure it is on brand, relevant and interesting. We will increase our use of video and engage with teams around the estate to feed in content. Customer reviews and user generated content will be encouraged. Our goal will be to grow following on each channel by 30% each year.
- Our PR plan will focus on lodges, weddings, castle and activities/events. Targeting online (bloggers and influencers) and offline (print media). Our target will be to have two pieces of significant press output each month.
- Atholl is a business of people and place, rooted deeply in the local community and environment. Marketing will continue to support communication with the various stakeholders who have a co-dependent relationship with us and ensure our positive news stories reach key audiences.



## C. Exhibition

The main objective of the Exhibition, which includes the tour, shop and restaurant, is to be run as a profitable business to provide funds to support the preservation of the castle and its collection.

To deliver that over the period of this plan, we must offer high standards and unforgettable experiences that are popular with a range of audiences.

We will offer new exhibitions that enhance the castle offering, encourage local repeat visitors through an enhanced seasonal pass and attract new audiences. For the 2022 season, the theme will be a 'Castle Couture' temporary exhibition.

A personal welcome and friendly smile is a core part of every visit to Blair which is the hallmark of our guide and ticketing team. We intend to further increase investment in our people to ensure the knowledge and experience that makes each visit unique, is secure and resilient for the long term. Connecting with this, we plan to add further depth to the tour by supplementing guidance with more stories and information from the castle archive. Our digital interactive tour guide system, Smartify, will also be expanded to include more stories, more languages and extend to more rooms, including the garden and grounds.

More special activities will be held in the gardens and grounds during the day visitor period and also as ticketed events during the evening, building on the success of fayres in 2021. Various styles of events will be trialled, but all will be in sympathy with the castle's brand and character.

In the wider grounds, there's opportunity to invest in the family market through development of facilities that identify Blair Castle as a destination for days out. The adventure playground is now almost twenty years old and requires renewal.

Additionally, the disused pony trekking centre is ideally located for a new attraction for families and an appropriate use will be identified and implemented.

We hope to increase engagement with schools in Perthshire and during the period of this plan we will reach out to head teachers to better understand how we can enable more young people to experience the history and culture contained within the walls and collection of Blair Castle.

We want a visit to Blair Castle to be convenient so further changes will be made to move our ticketing process online. Our new EPOS system will be configured to make digital ticketing simple and reliable expansion of our new EPOS system around the venue and to other events will also mean we can offer an improved season ticket with added benefits.

We aim to return to a pre pandemic level of turnover for castle events such as weddings and private functions, but to deliver this through higher booking value to reduce the overall number of events.

Perthshire is famed for its food and drink, and we want this to be one of the excellent and unforgettable experiences of visiting Blair Castle. We will work with our new catering company, Baxter Storey, to raise the bar even further on the quality, provenance, and presentation of our restaurant, ensuring it contains the best of Highland Perthshire produce. We will also expand the offering to the gardens so visitors can purchase light food and a range of drinks conveniently at a new kiosk called The Cannon.



## D. Retail

The Castle shop will continue to focus on Scottish products with relevance to the castle and its history, we do not foresee its character changing hugely over this period but there will be a focus on improving online sales of hampers and the Murray collection.

The caravan park shop will be re-launched as 'The Larder' with a much greater emphasis on quality local produce and treat items including toys and Atholl Estates merchandise. It is a shop for people to enjoy whilst they are on holiday and its stock should represent that and be in keeping with our brand. We do not see the shop as a direct competition to the existing villages shops but something different and with an obvious focus on the needs of our staying guests.



## E. Castle Gardens and Grounds

The castle gardens will continue to work closely with the castle, being the ideal location for events, such as weddings at St Bride's Kirk or a reception in Hercules Garden, exciting trails for children as seen at Hallowe'en, outdoor theatre, craft fairs and many more occasions that are suited to all the gardens have to offer.

The work for the castle areas, Diana's Grove, Hercules Garden and the Caravan Park will be undertaken by one team, with regular help from contractors with grass maintenance in the outlying areas, hedge cutting, fruit tree pruning and general grass management at the busy periods. The core team will include a senior gardener, two full time gardeners and a seasonal gardener with continued support from castle caretakers.

As the herbaceous plants get well established in Hercules Garden there will be less reliance on annuals, although some will always be sown for the joy of their colour, scent and for use in planting tubs, at the caravan park among other places. In early 2023 we will see the South End garden re-established after the roof and building works, some of the beds will be reduced in size. The castle gardens are honoured to be an RHS partner garden and free entry for RHS members will continue on Wednesdays.



## F. Blair Castle Caravan Park

Our park is ideally located for family and leisure breaks and this is the market on which we will continue to focus for the period of this plan. The main objectives over the next three years will be to increase profit, further improve the customer experience, increase investment in infrastructure and reduce our carbon footprint.

We also want to take a step back and consider the long-term plan for our park given changing socio-economic trends, innovative new holiday accommodation options and the need to address the climate crisis.

### Increase profitability:

- Improve occupancy over the shoulder seasons and winter
- Optimum use of all the park area (protecting the central green) by identifying where higher value can be derived by upgrading services starting with the conversion of pitches 1 to 16 to fully serviced touring. Part of this process will be to improve occupancy and sales data by more consistent use of booking software.
- We will introduce a premium range of caravan holiday homes to establish if they can achieve higher occupancy, as part of our deliberation over the future of that type of accommodation on the park
- Increase opportunities to upsell experiences and activities on the estate
- Renew and expand our retail offer
- Provide a fresh and consistent on-park catering service at The Sheiling

### Improving the Guest Experience:

- The children's playpark will be further upgraded and extended
- The online booking system will be made less complicated by simplifying and upgrading the range of pitches we offer
- Renew our park wi-fi system to make it reliable and a source of favourable feedback

- Regular calendar of events during bank holiday weekends and summer holiday months, including greater integration with our ranger service

### Investing in Infrastructure:

- Shower block two will be refurbished
- Most of the park's perimeter fence will be replaced
- Woodland Lodge phase 1 decking will be renewed and their internal decoration will be refreshed
- Our CCTV system will be modernised and extended to all retail areas
- The warden lodges will be externally refurbished
- The water supply pipe network will continue to be renewed in phases each winter

### Reducing Our Carbon Footprint:

- Ensure our shower block lofts are fully insulated
- Encourage all new static caravans purchased onto the park to comply with residential specification BS3632 which then creates an opportunity to use electric or air source instead of gas for central heating
- Ensure all thermostats on lodges and caravan holiday homes are turned down to 15C during periods of voids
- Establish if solar panels can be viably installed on each shower block
- Increase availability of EV charge points as demand requires
- Take advantage of biogas for heating if sustainable supplies can be sourced during the period of the plan
- Investigate the use of air source heating to replace oil at the main reception building



# G. Estate Holiday Accommodation

The portfolio will increase over the duration of the plan; with the addition of Blairinraish (May 2022), Kingraigie Cottage (Autumn 2022), Charlottefield and Glen Glack (early 2023). Furthermore the renovation of Tulliemet House will be completed in early 2023.

Our main objectives will be:

To raise standards:

- Building on the quality of the newly added and renovated lodges, we will strive to ensure that all our properties are graded as at least Visit Scotland 4\* by collaborating with the Works Team to deliver consistent, ongoing maintenance and a coherent Atholl 'style' that embraces the character of each property
- By 2023, we aim to have all properties graded by Visit Scotland and respond to any suggestions that would ensure that our properties reach a 4\* status

To build our profile:

- 80% of customers now book holidays online. We must, therefore, work collaboratively with the Sales and Marketing Team to increase our online presence.
- It is imperative that Google Business, Google reviews and our new Stay on Atholl social media pages are kept up to date at all times.
- The new website will feature clear methods to 'book online'. However, we must accept that it will take time to build momentum and delivery to our own site through SEO and the afore mentioned pages. Therefore, our interim strategy is to continue using third parties such as Airbnb and Cottages.com during quiet periods; but by 2025, it is our aim to take all booking directly.

- Feedback is currently submitted by guests after each stay, which is reviewed and assists in maintaining a high standard of cleaning and customer service. By summer 2022, we will encourage guests to leave such reviews online to increase our web presence.
- We will further develop the range of additional services and activities that guests can opt to purchase during their on-line booking journey.

Improve communication:

- Collaboration with the Sales and Marketing Team to create bespoke correspondence to increase repeat custom
- To work with the Sales and Marketing Team on their review of the specific customer journey for guests. In particular we should aim to upgrade the pre-arrival information to let guests know what's on and the activities which will be available to them during their stay.
- Look after our people
- Underpinning our aim to achieve 4\* and 5\* reviews and positive feedback are the dual tenets of cleanliness and on-going maintenance. We must therefore develop a permanent, robust and flexible housekeeping team to ensure high quality and consistent cleaning throughout the properties. As the team is bedded in, the Lodges Manager will perform regular and thorough checks of all lodges.



## H. Events

### Horse Trials

Historically the event has been financially challenging but of great benefit to the community and local economy of Blair Atholl. However, the event has to also work financially for the estate, and to that end, we aim to stabilise cost and gross sponsorship and hospitality revenue, aiming to achieve a minimum profit of 10% of turnover.

With the expansion of the number of classes and the age of the existing store of jumps, there is a need to replace older cross country fences to bring them up to current safe standards and add to the fences for all classes. This will reduce the necessity to borrow/hire fences each year. In keeping with the horse trials being Scotland's premier equestrian event, it will also be necessary to acquire a championship set of show jumps to raise the standard of presentation in the Main Arena.

As the event continues to expand and technology moves forward, the existing site layout and infrastructure, will be refined and improved to reduce challenges of attendees parking in the incorrect place, or avoiding parking charges. This is also an opportunity to make more use of technology to utilise digital accreditation and organise volunteers where possible.

The expectations of event visitors have become more sophisticated. There is a need to redevelop the members and sponsors marquee to be more contemporary and raise the standard of the offering and presentation. The Country Fair aspect of the event has also become less relevant, so there is an intention to redevelop the schedule in the satellite arenas to maximise income, while keeping some entertainment elements.

As the horse trials continues to grow and other events spaces across the estate are developed, there is a need to maintain more staff continuity within the horse trials team to increase efficiency and allow other events to be organised.

### Atholl Gathering

In the last weekend of May annually, we will continue to host the Atholl Highlanders Parade and Gathering. The Atholl Highlanders represent so much of our local community and history and we treasure their presence. The Highland games will remain largely the same but with better food offerings and a desire to make it the best family day out we can.

### Estate Events

The intention is to develop a further calendar of events annually, to make full use of our available spaces, Target Park and Clachan in particular. To do this there is a need to expand the owned events equipment that can be used across multiple events and to improve infrastructure in Target Park.

All events are to be integrated into the castle ticketing system, to allow cross promotion and streamline the booking and reconciliation process. Alongside this there is a need to develop event marketing in association with the marketing team

To effectively deliver this, we will need to build a team of estate staff and other contacts who become a reliable and efficient events team.







# Estate Enterprises

A. Farming

B. Forestry

C. Moorland Management

D. Let Properties

# A. Farming

## Farming at Balachallan

Over the next five years we will be migrating away from a 'traditional' farm towards a 'regenerative' farming system. We will be working within a contract model and the key objectives through this period will be to farm with little chemical input using animals to regenerate the land and environment aiming for a mixed animal system that is profitable before subsidy. This will be particularly relevant if, as is expected over the next 5 years, subsidies bend towards the environmental reward.

We will measure success on this farm on a double axis basis: that it should be profitable whilst also being environmentally beneficial.

Over the course of this plan we intend to move to a regenerative trajectory, implementing the following changes:

- Reduction in sheep numbers, including the complete removal of the flock from the hill, to allow the Caledonian Pinewood the chance to naturally regenerate.
- Re-introduce and breed a hardy cattle to numbers that are sustainable aiming for a herd size of approximately 150 breeding native bred cows. These cattle out-winter and we will aim to significantly reduce the reliance on conserved forage by the use of carefully managed long grass grazing.
- Remove our reliance on wormers, chemicals and inorganic inputs to improve the ecosystem processes on the farm all the while pushing the photosynthetic processes to increase biomass production.
- We will measure our soil carbon throughout the duration of the plan, with the aim to increase soil carbon by 2% over the course of the plan.
- Fully optimise carbon and bio-diversity credits available through the works we will engage in to enhance natural capital on the holding.

- We will promote and provide opportunities for others to watch the work that we are undertaking at Balachallan.
- Develop a business proposal to evaluate the commercial opportunity of establishing an Atholl brand for direct sales of 'grass fed' beef and lamb.

## Farming at Balanloan

Effective farming requires attention to detail which delivers leading results through small improvements to margins but it's equally important to have a clear long-term strategy that aligns the business with markets and the environment.

The key objectives for the period of this plan will be to run a profitable enterprise, adapt and prepare for changes in support for agriculture in Scotland taking effect from 2024 and transition towards a farming model that emits less carbon, improves soil health and enhances our biodiversity, learning from the experiences of our colleagues at Balachallan.

In delivering our objectives, we recognise the farm's role in maintaining the policy grounds of Blair Castle and supporting events at the castle such as the horse trials, both of which influence the extent and pace of change away from conventional agriculture.

Early guidance from the Scottish Government reveals that financial support payments for agriculture in Scotland will increasingly move towards promotion of public benefits and away from food production. Consumers are also wanting produce that can demonstrate it didn't cost the earth. This agenda aligns with the values and ambitions of the estate so we are fully supportive of the changes that need to be made, subject to the constraints of managing land heavily invested in tourism and events .



Therefore, our ambition over the next three years will be to:

- Undertake a whole farm soil carbon audit in summer 2022, providing a baseline against which we can set targets and track progress. We will ensure that before we undertake a whole farm soil carbon audit that there is sufficient understanding of what the measurement will be.
- Undertake a whole farm greenhouse gas emissions audit in summer 2022, with the same objective
- Participate and support the whole estate bio-diversity audit, starting in 2022
- Fully optimise opportunities from the next round of ACES to benefit natural capital on the farm
- We will move towards cattle breeds that are more suitable for the farming model described above
- Increase the cattle herd size up to 150 bulling animals if this can be achieved with minimal use of nitrogen fertiliser for silage production and still enabling us to achieve our main strategic direction as described above
- Aim to stop using nitrogen fertiliser by the end of this plan period
- Reduce our annual production of wrapped silage bales from 2000 to 400 by reviewing our silage clamp provision
- Significantly reduce or disperse the Glen Tilt black face sheep flock following implementation of the Glen Fender plantation scheme
- Manage the park and Kinraigie flocks as one, which should enable support of 1000 breeding ewes
- Move to a complete EID system for the sheep by 2024
- Benchmark livestock production performance on an annual basis
- Fully optimise carbon and bio-diversity credits available through the works we will engage in to enhance natural capital on the holding
- Work with the A9 dualling process to maximise opportunities to relocate all cattle housing and handling into one building
- Develop a business proposal to evaluate the commercial opportunity of establishing an Atholl brand for direct sales of beef and lamb

## Farming at Inverack

Although small in scale the focus will be on optimising environmental grants with the intention of creating more hedgerows and wild flower meadows. The learnings from the regenerative model at Ballachalan, where applicable, will be implemented here.



## B. Forestry

Atholl has a long history of being a leader in Scottish forestry and we aim to continue that legacy through professional management of our existing woodlands as well as the creation of new woodlands. Our commercial forestry should meet and exceeds the industry standard approach for sustainable forestry, including standards and requirements, regulations and monitoring and reporting, and to embrace an approach that improves, protects and enhances biodiversity within the forest.

The Forestry Department does not have a ground squad but will work with a core base of local contractors who have been selected for their high standards, flexibility and experience. Contractors will be continuously evaluated on performance and price to ensure the best possible return for the Estate.

Clear-fell and restocking will continue to be the main timber harvesting operation and biggest income / expenditure. The aim will be to plant at least 80% of felled sites within two growing seasons of felling, where conditions and felling timing allow, they will be planted within one season. No more than 20% of sites may be held fallow longer than this for operational reasons such as access, or to allow weevil populations to reduce. To ensure the profitability of the forestry the timber will continue to be sold by standing sale.

This will in the main be to a single buyer who has a long-term relation with Atholl as this build's confidence in standards and pricing and trust, however over the course of the Plan a block will be put to the open market to ensure prices are comparable.

Deer are one of the biggest threats to the successful establishment of young trees, so to ensure we have accurate figures for deer populations, a full population and impact monitoring assessment will be carried out of all the core woods over the next two years. The plan will set out the steps to reduce deer numbers to a level where damage to young trees is within acceptable standards as per industry standards.

Opportunities will be taken to carry out restructuring of smaller blocks of woodland such as in the Castle Polices and in Lower Glen Tilt. Removal of exotic species such as Sitka and the replanting of Native species will enhance the landscape and biodiversity of these areas.

Opportunities to carry out new planting (Woodland Creation) will be evaluated and actioned where appropriate. Dalnamein, Glen Fender and Balgowan are significant schemes that amount to over 1,700 hectares and approximately 1.8 million trees. That is almost 10% of the Scottish Governments annual woodland creation target of 18,000 hectares a year across Scotland by 2025. These new schemes will provide significant economic, social, and environmental benefits to the area and will have an increasingly important role to play in climate change mitigation and adaptation.





## C. Moorland Management

Atholl has a long history of being a sporting estate offering its visitors red deer stalking and we aim to continue to offer the best stalking experience we can befitting of our recently refurbished lodges.

Our main, long-term objectives for the period of this plan will continue to be effective management of red deer and supporting a resilient moorland habitat that can sustain responsible walked up shooting of red grouse. After a period of change and challenge for our herd of Highland ponies, our ambition is to return to a position of stability and resilience by the end of this plan period. We will also fully support the establishment of new woodland schemes at Dalnamein and Glen Fender, primarily through the eradication of grazing herbivores from within the scheme fenced areas.

### Management of red deer on the open range

We will deliver reduction culls of red deer in collaboration with our neighbours on the West Grampian Deer Management Group. Working through counts and habitat surveys with the WGDMG we will set these reduction targets across the estate, aiming to achieve an average density of 12 deer per square kilometre by the end of the plan period. Due to large scale planned planting of Native woodlands over this period we will also deliver compensatory culling of deer as agreed within the planting consent process. We will continue to work closely with Nature Scot and the Cairngorms National Park Authority on deer counts and habitat surveys with the intention that this information continues to feed into our future deer cull modelling.

### Walked-up red grouse shooting

Our objective is to return stocks of red grouse on the Tarf areas of Forest Lodge and the tops of Dalnamein and Bruar to numbers sustainable for walked up shooting by the 2025 season. We shall achieve this by working as a team focusing on sustained, legal predator control, appropriate muirburn and effective provision of grit.

### Highland Ponies

By the end of this plan period we will have returned to having a herd of ten working deer ponies across the estate, with two young ponies undergoing training. Policy on the estate is for all guest stalking where possible to be done with ponies and not vehicles, apart from on Clunes, due to the terrain. Longer term, we aim to breed and train all our own replacements although some purchased replacements will be necessary in year one, to provide for the immediate needs of the beats. Ponies will continue to be assigned to stalkers on their beats, to look after and sustain. It is recognised that investment in additional staffing is required to produce and train home bred replacements, but we accept our responsibility, as a team, to collaborate with the training plan.

### Supporting Woodland Expansion

The team will support woodland expansion in the Dalnamein and Glenfender areas, initially by working throughout the course of the plan to reduce grazing herbivore levels to zero during the creation of the schemes and also by undertaking the reduction culls set across the wider area.

### Habitat and Natural Capital

We will continue habitat condition monitoring surveys for dwarf shrub heath and blanket bog on a three yearly cycle. Through reductions in herbivore grazing, mainly deer and sheep, we aim to have the majority of plots showing as being in favourable condition by the end of the plan period. As peatland is restored, starting with plots on Clunes, we will be trained to undertake monitoring surveys that comply with grant conditions and undertake these as required. There will be opportunity for us to support field survey in connection with the estate's wider biodiversity baseline audits which are being developed and completed during the period of this plan.

## D. Let Properties

The estate is a major provider of leased property in Highland Perthshire, providing an important option for those who want to live or set up a business in the area.

The three main types of properties we offer are housing, workshop units and land for agriculture.

Our objectives for the period of this plan are:

- Maintain clear lines of communication with tenants, ensuring the property manager's contact details are readily available and the system for logging enquiries or repairs is responding within a reasonable time
- Each tenant should have the opportunity to meet the property manager in person at least once every three years, preferably at the property to discuss the tenancy and any issues that may be outstanding
- Work collaboratively with tenants to improve their property's energy efficiency, aiming to achieve EPC level D at all let houses by the end of the plan period







# The Built Estate

A. Maintenance

B. Development

C. Sales

## A. Maintenance

The department's key focus is the maintenance and regulatory compliance of the built estate on Atholl through our direct labour force and close working relationships with local contractor services.

Property refurbishments and larger infrastructure projects will be procured through competitive tender under a project team led by a nominated architect or engineer.

The preservation of Blair Castle's external fabric is guided by a 30 year repair plan which is delivered through our appointed castle architect, and an annual planned maintenance plan which is delivered by the Works Department.

Our main objectives for the period of this plan will be to:

- Maintain a productive team of three plus foreman and upskill them to provide a multi trade response to tasks, where possible resolving most in one visit
- Embed our preventative maintenance policies, specifically to ensure all external metal and timber work are repaired and painted every 10 years and all roofs are slate checked every 3 years
- Capture critical condition data on each core property to enable more informed long term cash flow predictions

Further objectives we intend to achieve include:

- All residential properties will be rated at EPC level D by 31 March 2025
- Private water supply upgrades will be completed on the following systems
  - o Blairauchdair and Balanloan – new supply network connected to castle mains network
  - o Tomnauld to Balgowan – new supply network connected to mains
  - o Glen Fender – new supply network connected to a private borehole
- A presumption away from installing oil boilers for new or renewing residential central heating systems. For smaller, insulated properties, the presumption will be to use electric or air source heat pumps. For larger, less well insulated properties, gas fire boilers that are hydrogen-ready, will be favoured
- The team will transition to fully digital based field notes for timesheets, safety reports and vehicle / machinery inspections





## B. Development

The forward plan covers a significant period in the Perthshire land development sector. In 2022, the Scottish Government will introduce The National Planning Framework 4 (NPF4) which provides a new strategic overview to land development in Scotland for the period to 2045. Following the introduction of NPF4, greater emphasis will be placed on how development reduces net greenhouse gas emissions and benefits biodiversity.

2022 also marks the start of consultation for Perth and Kinross' Local Development Plan which takes effect from 2024 and the predicted start of the next phase of A9 dualling between Dunkeld and Ballinluig.

Though property development on Atholl remains heavily restricted due to constrained infrastructure, land designation and limited public road access, we aim to optimise projects that create economic resilience for our business and community resilience for those who live and work as neighbours to the estate.

We aim to:

- Fully engage with the planning department of Perth and Kinross Council and community councils to identify land owned by Atholl that can be zoned for development in the next local plan
- Progress sites identified in the Development Brief we agreed with Cairngorms National Park Authority in 2021
- Progress development of further industrial units near Logierait and consider further potential at Blair Atholl
- Build a holiday cabin development by Cally Loch, Dunkeld to be called Glen Glack

## C. Sales

Our management approach on Atholl is to base decisions on the long term, however there are cases where dispersal of property assets can be for the long term good and in most cases, the proceeds of sale are invested back into the estate.

A current example is housing. The estates own over 200 houses, most of which are over 150 years old. Most of our houses are leased as primary homes or occupied by staff as part of their employment. The estate attempts to keep rents at a level that's locally affordable however a combination of inflation, property age and increasing regulation is combining to make this difficult to sustain.

It will therefore be our policy to consider the sale of houses that become vacant, not in core locations, and which are in a poor state of repair.





# People



# People

The estate is nothing without the people who live and work here and we want Atholl to be a place where people want to work and live. Where employees get training, develop their skills, desire responsibility and ultimately stay on the estate for a long time. Atholl should be a place where visitors and the local community feel welcomed and engaged.

For Employees a knowledge and learning culture will be nurtured through training funds, improved recognition of achievements and visits to high performing sector peers

While communication will continue to be carried via various traditional and contemporary mediums, we will introduce a single information platform for staff communication.

Objective based staff reviews, backed up by regular one-to-one check-ins are an important opportunity to provide feedback, recognition and discussion on personal development. We will introduce greater consistency and value to staff appraisals by the introduction of standardised meeting guides and further support for line managers with the minimum expectation that all staff receive at least one personal review annually

Safety is a basic expectation of the workplace and the best pillars upon which to deliver safety are good training, equipment that's fit for purpose and the nurturing of a safety culture across the estate. Periodic auditing of these pillars is essential as a health-check and we intend to expand our in-house safety auditing to at least one per month per team, to augment external auditing, which will continue.

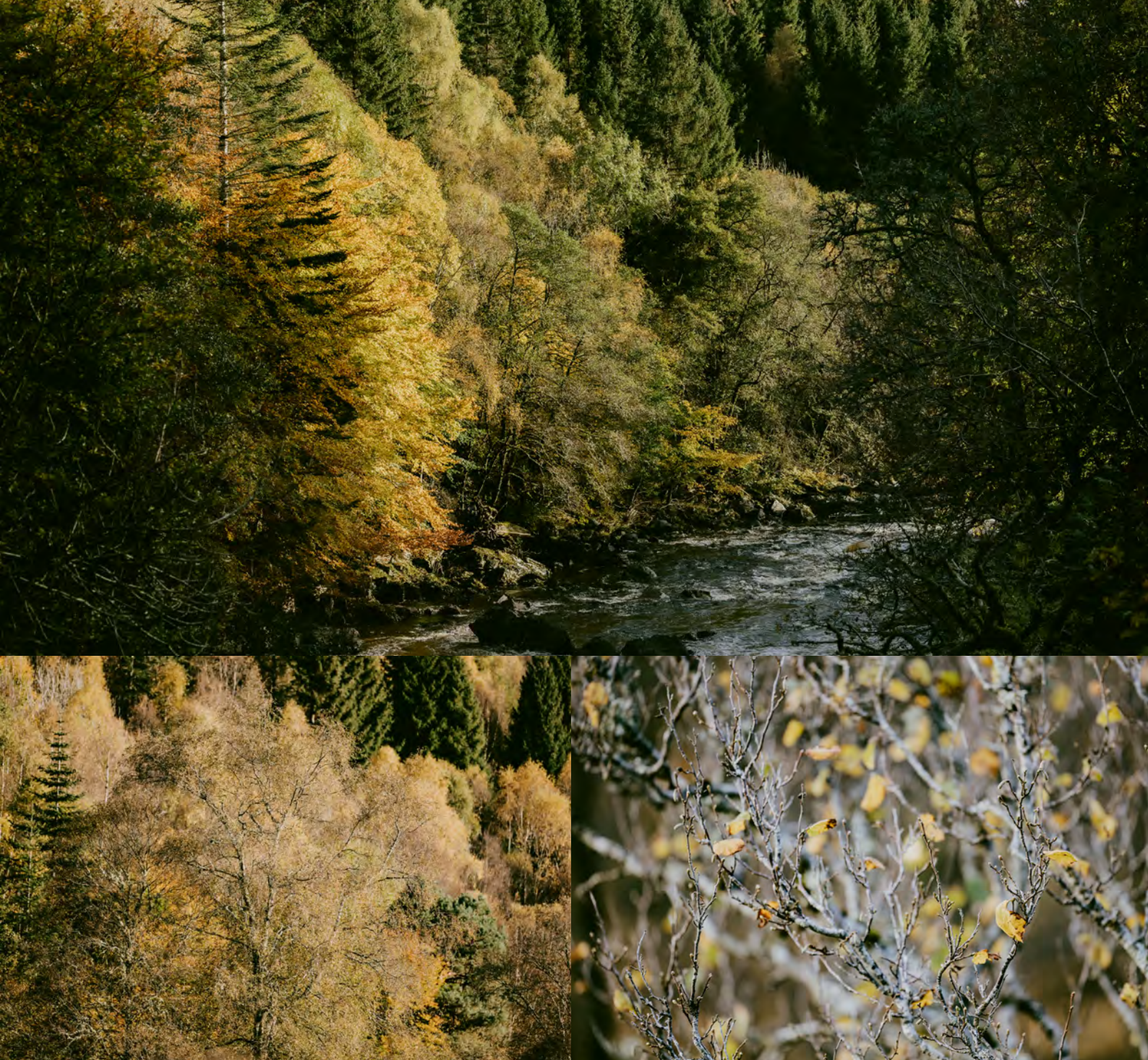
We recognise that wellbeing matters to health. Wellbeing adds years to life, improves recovery from illness, is associated with positive health behaviours and with broader positive outcomes.

Work can have a positive impact on our health and wellbeing.

Healthy and well-motivated employees can have an equally positive impact on the productivity and effectiveness of the business. For all these reasons, Atholl Estates are supportive of staff adopting healthy lifestyles, and has developed an employee health and wellbeing policy to set out and help all staff understand the interaction between health and wellbeing and work and to support and maintain the health and wellbeing of all staff. It covers our commitment to employee health, the responsibilities of managers and others for supporting and maintaining psychological health, encouraging health promotion initiatives, communicating and providing training and awareness on health issues, signposting the range of support available to staff and highlighting the organisational commitment to handling individual issues.







# The Environment

A. Carbon

B. Biodiversity



## A. Carbon

Atholl has an abundance of nature and habitats that we cherish and love dearly and we are committed to enhancing the biodiversity of the estate. The climate emergency has made it clear to us that we must be proactive about this. In the context of Atholl, natural capital is mainly represented by carbon and biodiversity (hydro power is covered under Energy) and our intention over the period of this plan is to increase investment in the protection and enhancement of both predominantly through peatland restoration and planting more trees.

Initially, we need to better understand where our reserves of natural capital are located and where there's opportunity to improve their condition by changes to land management.

We generate green energy through hydro power which is supplied to the national grid, offsetting electricity which would otherwise be generated via fossil fuels. Over the course of this plan, we aim to reduce our emissions on the estate and increase sequestration by improving the ability of our soil and peatland to hold carbon and by planting more land to woodland. Working alongside Tree Story, forestry consultants, our target is to plant roughly 1.8 million new trees in addition to restocking felled trees during the period of this plan; the vast majority of these new trees will be native woodland. If successful these schemes will be registered under the woodland carbon credit scheme.

Peatland restoration or peatland rewetting has already started and we are working with the Cairngorms National Park Authority on ambitious plans to rewet peatland which will not only lock in but also sequester carbon. Informative videos of these schemes can be found on the Atholl Estates YouTube channel.

## B. Biodiversity

Over the period of this plan, we intend to audit the health status of biodiversity across the estate and from that work, set targets to actively work towards improving habitat. A significant means of delivering this will be by transitioning our in-hand farms towards regenerative agriculture and planting native woodlands.







# Energy

A. Consumption

B. Fossil Fuel Reduction

C. Renewable Energy



## A. Consumption

The key means of achieving this objective will be through insulating our houses. We aim to achieve EPC level D at all properties by the end of the plan period and higher in cases where properties have been refurbished.

All properties, including holiday accommodation will have room thermostats fitted to allow heat control to be convenient and dynamic. We intend to work with SSE to ensure all properties are fitted with smart meters to monitor and control consumption. There will also be increased monitoring of heat settings during voids in our holiday accommodation and office / visitor attraction space.

We don't anticipate much opportunity to reduce vehicle energy consumption during the plan period as our land based industries require off road, high workload capable cars, trucks and tractors. However, greater attention will be given to ensure fuel consumption is a key metric in the selection of new vehicles and that work journeys are made as efficient as possible by smart use of time and planning.

Reduction in energy consumption on our farms will be covered in more detail in the Rural chapter of this plan. The vectors for achieving reductions will be via a move to more regenerative methods of agriculture which requires no tillage and less inorganic fertiliser.



## B. Fossil Fuel Reduction

Blair Castle is our largest unit consumer of energy, mainly for heat as most electricity is sourced directly from its own hydro scheme. The castle's Grade A Listing make it imperative that heat is maintained throughout the year, to impede degradation of the fabric and contents from damp however its scale and design inevitably demand a high energy heating source. Currently, the heat fuel is oil. Various studies have investigated non fossil fuel alternatives such as biomass and heat pumps but all so far have failed to be remotely viable or compliant with the historic listing. In the long term we anticipate the commercial hydrogen will be the answer but until that fuel is available, we anticipate a transition fuel will be liquified petroleum gas (LPG) or possibly biogas if an ethical and affordable supply could be sourced.

The largest consumer of fossil fuels by group on the estate is our housing stock which are mainly heated by oil. As from 2022, no further oil boilers will be purchased to replace existing stock unless there is clearly no alternative available. Our policy will be to use electric, LPG or air source heat pumps (ASHP) for renewing systems as circumstances indicate. As for the castle, electric and hydrogen will be the long term energy sources but we anticipate hydrogen for heat is at least 5 years away from being commercially available.

Electric vehicles (EVs) will be presumed in favour when purchasing new vehicles although options for our off-road fleet are not anticipated to be commercially available during the period of this plan. EV charging stations are already available at the castle, park and estate office. We will expand on the units and power sources as demand indicates.

## C. Renewable Energy

Investment in hydro generation during the last decade has exhausted the commercially viable opportunities in that sector on the estate however continued investment and attention to maintenance must be applied to ensure they continue to operate at optimum efficiency.

Solar for heat (water) and solarPV (electricity) has been unviable without grant at our latitude but with costs falling due to advancements in technology and scale, we will continue to monitor these options. There is particular anticipation that solar for heat could be viable for the caravan park shower blocks and solarPV farms might become viable during the period of this plan for sites with good access and close proximity to the grid or a high demand load such as an industrial estate.







# Appendices



## Appendix A: Atholl Management Team Values

### Authentic and trustworthy

We act with integrity towards each other, which includes accepting when we need help, and we follow through on our commitments.

### Welcoming and supportive

In all our interaction, with each other or with guests, we want to approach people with empathy, to feel respected, empowered and valued.

### Responsible

We accept a duty of care for ourselves, our peers and guests, to maintain a healthy and safe working environment.

### Inquisitive

We aspire to be clear on the 'why' as well as the 'how' and pursue learning that unlocks personal and business development.

### Committed to the long-term future

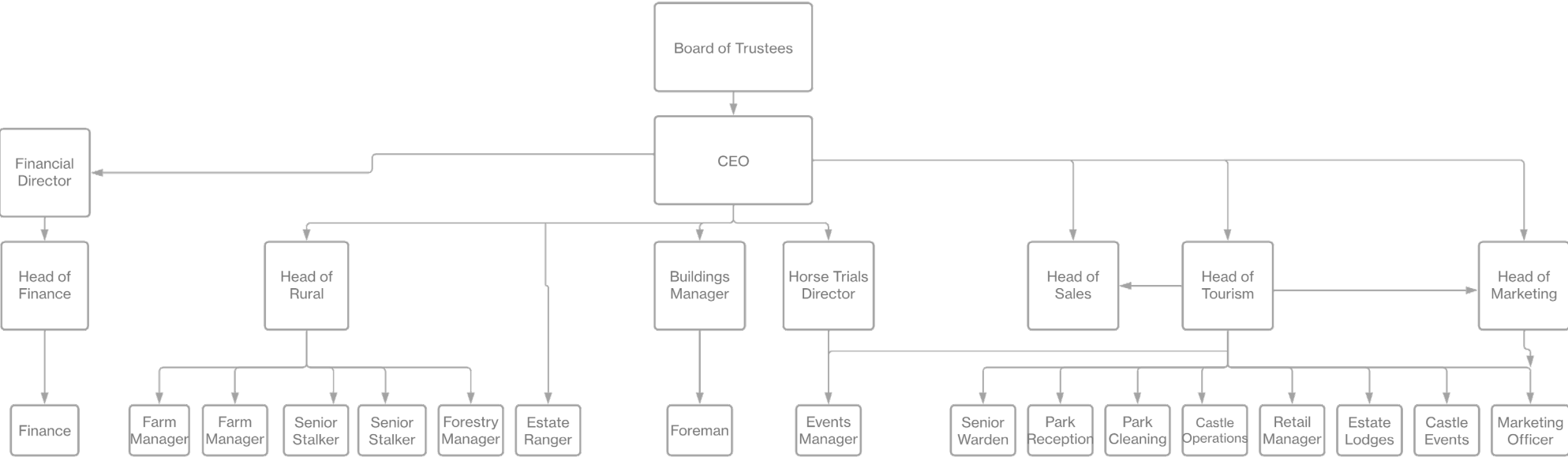
Though our contribution to the legacy of Atholl may be brief, our respect for those who have gone before inspires us to invest for those who come after.





# Appendix B: Atholl Estates Organisational Chart

Atholl Estates Organisation Chart



# Appendix C: Code of Practice

## Working together

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

## Working with our commercial and farming 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 in a timely manner.

## 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 in a timely manner.

## 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, support 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 D: Communication Policy 2022–2025

Atholl Estates aims to communicate openly with our staff, local community and the wider 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)	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 2023 & 2025
Ranger Service events and Information Centre	Recreational access support	Ongoing
e-Newsletter	Distribution of visitor services news to customers in our database	Monthly
Social media	Provides an update of what's happening around the estate.	Daily

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 into account at regional government level.	Ongoing
Personal and informal interaction with local and regional representatives	Promotion of good relations and open communication.	Ongoing
Estate visits for Government and Agency Groups	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

# Appendix D: Communication Policy 2022–2025

Internal	Purpose	When
Monthly report	Distribution business information and news to staff	Monthly
Management meetings	To discuss and present relevant issues that can then be cascaded through departments	Weekly / Monthly
Department team meetings attended by senior management	To allow a two way information exchange between management and employees on issues relating to their operations	Weekly / Monthly
Provision and annual updating of individual staff induction packs	General information and facts about the estate	April
Annual individual staff development reviews with 6 month reviews where appropriate	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
Slack	A digital business communication app for daily news and discussion	Daily







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