Saint Lucia National Trust

Strategic Plan
2020 – 2030

Draft of 29 July 2019

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Introduction

The Saint Lucia National Trust (the Trust) is a membership organisation created in 1975 by the Saint Lucia National Trust Act[1]. Its structure and operations are defined by the Saint Lucia National Trust Rules, Statutory Instrument No. 27 of 1984. Strategic planning has played an important part in the life and growth of the organisation in recent times, with its first formal strategic plan developed and adopted in 1998 for the period 1998 – 2007. In 2010, the Trust formulated and adopted a new plan for the decade leading to 2020. The purpose of the present strategic plan is to guide the work of the Trust for the period 2020 – 2030.

This strategic plan is structured in three parts:

- Part 1 articulates the **overall strategic framework**, with a statement of vision and mission, and a description of guiding principles, values and strategies.

- Part 2 presents the **programming framework** to achieve the three strategic outcomes that the Trust seeks to deliver over the period.

- Part 3 briefly describes the **institutional and operational arrangements** that will support and facilitate the implementation of this framework.

During the period of implementation of this strategic plan and beginning with the 2020/2021 fiscal year, the Trust will formulate and adopt **tri-annual implementation plans** that are based on the programming framework. These plans will identify, for each of the strategic outcomes:
- specific objectives for the three-year period;
- indicators to assess the extent of achievement of objectives, and sources of verification;
- outputs and activities to produce the outcomes;
- indicators to monitor delivery of outputs, and sources of verification;
- human, financial and technical resource requirements; and
- partnerships and implementation arrangements.

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[1] The objects of the Trust as per the founding Act of 1975 are:
a) the listing of buildings, objects and monuments of prehistoric, historic and architectural interest and places of natural beauty with their animal and plant life;
(b) the listing of objects of prehistoric, historic and archaeological interests;
(c) the compilation of photographic and architectural records of the above;
(d) to locate and to promote the preservation of buildings and objects of archaeological architectural, historic, artistic or traditional interest and the establishment of museums;
(e) to promote and preserve for the benefit and enjoyment of the State of submarine and subterranean areas of beauty or natural or historic interest and to preserve (as far as possible) their natural aspect, features, animals and plant life;
(f) to list the flora and fauna in the areas mentioned in paragraph (e) and to promote their conservation;
(g) to make the public aware of the value and beauty of the State's heritage as set out above;
(h) to pursue a policy of preservation, and to act in an advisory capacity;
(i) to acquire property for the benefit of the State;
(j) to attract funds by means of subscription, donations, bequests and grants for the execution of the above objects:
(k) to administer the Trust property for the furtherance and achievement of the above objects.

Part 1: Strategic framework

Vision

The work of the Trust is guided by the vision of a society in which the value of the collective natural and cultural heritage is known to and appreciated by all citizens and institutions, and in which those citizens and institutions behave in a manner that respects, nurtures and valorises that heritage, because:

- the natural heritage has intrinsic value, and ecosystems and species, especially those that do not exist anywhere else, deserve protection;
- a country's ecosystems, its history and the products of that history are unique to that country and its people, and they combine to define a collective identity;
- knowledge and appreciation of one's heritage builds self-esteem and contributes to personal development;
- identity, built on collective memory, an awareness of history and a shared appreciation of and respect for heritage, contribute to self-esteem, social cohesion and nation-building;
- several elements of the natural and cultural heritage, such as natural ecosystems, flora and fauna, historic sites and monuments, constitute important assets that can support livelihoods, social service, recreation, education, and economic activity (e.g. in tourism, crafts, water supply, renewable energy).

This vision is fully consistent with the principles and objectives of sustainable development, defined as the form of development that meets the needs of the present without compromising the ability of future generations to meet their own needs. It is a vision of development in which conservation[2] is a fundamental and indispensable component.

In pursuing this vision, the Trust is well aware that there are several powerful factors that militate against the realisation of this vision, including:

- the perception, still prevalent in many sectors of society, that conservation can be a stumbling block to economic development;
- a global economic environment that limits the options available to small states and developing economies;
- fiscal constraints and their impacts on public sector expenditure;
- the pursuit of short-term economic gains without consideration for the impacts on long-term sustainability; and
- the increasing vulnerability of small island states such as Saint Lucia, especially in the face of climate change.

The Trust further understands that the concept of heritage is not static, that there will always be varying appreciations and understandings of it in the same society, and that it constantly evolves, especially thanks to our engagement with it. The Trust therefore contributes to that evolution by helping to shape the concept and our understanding of it.

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[2] Conservation is defined as the "protection, care, management and maintenance of a natural or cultural asset in order to safeguard the conditions for its long-term permanence", with "sustainable use" considered as being an integral part of conservation. In this document, the term "conservation" is therefore used and understood to include "protection", as well as all uses that do not compromise the integrity or sustainability of the asset conserved.

Mission

In order to realise this vision, the mission of the Trust is to **place heritage at the centre of human development** at national, community and personal levels, with a focus on the places (landscapes, natural and historic sites, monuments and buildings) that constitute that heritage.

Principles and values

A number of principles and values have informed the formulation of this strategic plan and will guide its implementation:

- *Holistic approach*: the Trust sees nature and culture as intimately connected, as two integral parts of the country's heritage, and is aware that the area in which it creates value is indeed in promoting a holistic approach to conservation, reflecting the interdependence between nature and culture in its programming.

- *Focus:* the Trust has a very broad mandate, and the needs in natural and cultural heritage conservation are many and urgent – however, the Trust needs to focus on its core mission, implementing a programme of work that is directly relevant to that mission, complementing the work of the other organisations that have mandates in environmental management and cultural development, and ensuring that its efforts are sufficiently sustained to have the desired impacts.

- *Sustainability*: because the Trust believes that development must be sustainable in environmental, economic, social and cultural terms, it is committed to making its own interventions and operations sustainable and environmentally responsible, and to contributing to the sustainability of its partnerships;

- *Mission-driven*: the Trust has a clear mission, and develops implementation plans, programmes and projects that are consistent with that mission. The Trust acts proactively, but with the understanding that environmental and cultural heritage issues at times require a reactive approach.

- *Independence*: the Trust was designed and created as an independent organisation, and this independence must be retained, so as to ensure that the Trust can continue to speak out on national issues and play its role as Saint Lucia's conscience in relation to the nation's heritage, and also ensure that it can do so in a balanced and non-partisan manner.

- *Clarity*: the Trust must always be clear about its mission and intent, and it must communicate this very clearly to itself (members, council, staff), to its partners, to policy-makers and to the public at large. This implies that it must formulate and disseminate clearly its vision of heritage and of the place of that heritage in national, community and individual development, and that it must avoid actions, messages and images that may confuse members, partners or the general public.

- *Efficiency*: the Trust behaves responsibly and always seeks the most efficient way to achieve its objectives, with a careful allocation of the financial and technical resources at its disposal, and with the avoidance of duplicated efforts.

- *Accountability*: as a membership organisation created by the State with a broad national mission, the Trust is committed to making its operations transparent, to reporting on its performance, and to providing technical and financial accounts to the government and to its members.

- *Integrity*: the Trust is guided by its vision, mission, values and principles, and does not compromise these for political, financial or other reasons or gains. The Trust, however, always remains open to dialogue, and is well aware that needs and conditions evolve, at times requiring adjustments in objectives and approaches, preferably as a result of debate and negotiations.

- *Equity*: in all its programmes, operations and structures, the Trust is guided by the imperative to promote equity and prevent exclusion. This implies, among other things: a gender balance within the organisation and among the beneficiaries of its work; the use of both Creole and English in communications; a special attention to the needs and interests of vulnerable groups; programmes and activities that serve all parts of the island as well as the diaspora; and the use of methods and instruments that are sensitive to possible forms and factors of exclusion and inequity.

Strategies

In the fulfilment of its mission and in the implementation of this strategic plan, the Trust has adopted and follows a number of overarching strategies:

- *Facilitating collaboration*: the Trust works with a wide range of partners, both in-country at national and local levels, and externally with donors and regional and global institutions. It acts as a convener and a facilitator of collective action, avoids the duplication of efforts, favours concrete partnerships for programme and project implementation, and develops rules of engagement with partner agencies whenever required.

- *Building and mobilising membership*: in its strategic plan 1998 – 2007, the Trust stated that "it must see every Saint Lucian as a member of the organisation" and that "it will reach out to parts of the country and communities previously not seen as potential supporters of its work". The Trust remains committed to building a broad, strong and representative membership base, to giving that membership a strong voice and a significant role in the life and work of the organisation, and to mobilising its skills and talents whenever possible.

- *Providing leadership*: the Trust sees itself as a thought-leader, as one of the main national actors in the search for a pattern of development that is sustainable and respectful of people and their heritage. It does so by contributing to important national debates, and by building its own visibility, credibility and legitimacy.

- *Using integrated approaches*: based on its experience, the Trust recognises the value of approaches that integrate research, advocacy and action. Its programme of work therefore ensures that evidence and knowledge are produced and used to inform planning and management decisions, that concrete programmes and projects are implemented on the ground, and that the right policies are in place to enable effective conservation.

- o *Managing conflicts*: the Trust is aware that the fulfilment of its mission will at times place it in opposition to specific interests, and it is committed to managing tensions and conflicts whenever they occur in a constructive way, namely by communicating its position to all concerned parties, building the evidence in support of that position, inviting to and participating in dialogue, engaging local stakeholders, and seeking legal redress or formal arbitration when other avenues have been exhausted.

- o *Building its own resilience*: at the core of this strategic plan is the objective to build the resilience of the Trust, in accordance with the principles of independence and sustainability enunciated above. Its focus on its mission and its proactive approach to advocacy, its diversified financing strategy, a greater attention to financial and human resource mobilisation, and an even greater involvement of the membership will reduce the organisation's vulnerability to various factors and enhance its adaptability.

Policy guidance

The mission and programme of the Trust are consistent with, and contribute to, a number of national, regional and international policies, strategies and plans, and in particular to:

National laws, policies, strategies and plans:
- The National Cultural Policy
- The National Environment Policy and the National Environment Management Strategy
- The Coastal Zone Management Policy
- The National Adaptation Plan (NAP)
- The National Biodiversity Strategy and Action Plan (NBSAP)
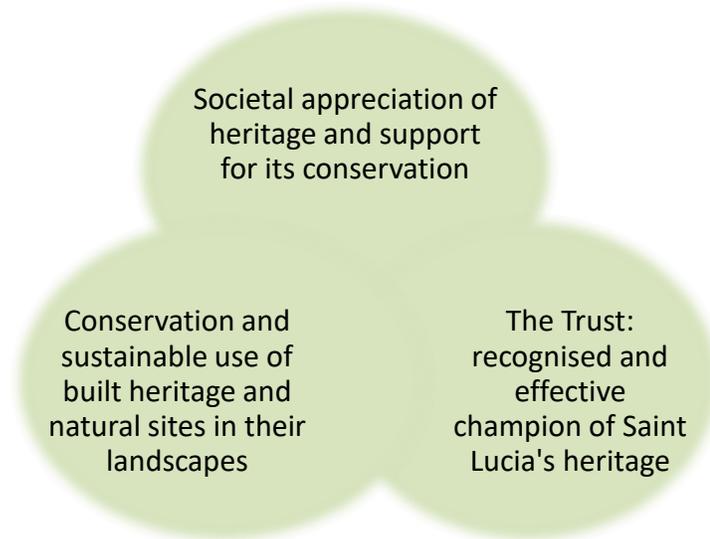- The National Land Policy
- The Physical Planning and Development Act

Global and regional policies and strategies:
- The Convention Concerning the Protection of the World Cultural and Natural Heritage (World Heritage Convention)
- The Convention on the Protection of the Underwater Cultural Heritage
- The Convention on the Protection and Promotion of the Diversity of Cultural Expressions
- The Sustainable Development Goals (SDG) and notably:
    - o SDG 14: Conserve and sustainably use the oceans, seas and marine resources for sustainable development
    - o SDG 15: Protect, restore and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification, and halt and reverse land degradation and halt biodiversity loss
    - o Target 11.4 of SDG 11: Strengthen efforts to protect and safeguard the world's cultural and natural heritage
- The Convention on Biological Diversity
- The United Nations Framework Convention on Climate Change and the Paris Agreement
- The United Nations Convention to Combat Desertification
- The St. George's Declaration of Principles for Environmental Sustainability in the OECS
- The Convention for the Protection and Development of the Marine Environment in the Wider Caribbean Region, known as the Cartagena Convention, and its Protocol on Specially Protected Areas and Wildlife (SPAW)

Part 2: Programming

Programming framework

The work and development of the Trust over this decade are structured around a framework built on three related and mutually reinforcing pillars (strategic outcomes):

Societal appreciation of heritage and support for its conservation

Conservation and sustainable use of built heritage and natural sites in their landscapes

The Trust: recognised and effective champion of Saint Lucia's heritage

Societal appreciation for heritage and support for its conservation

Rationale: responsible, evidence-based advocacy is needed in support of conservation, and the effective conservation and sustainable use of built heritage and natural sites cannot be achieved without policy reform, raised awareness at all levels, and suitable attitudes and behaviours. It is also thanks to this desired change in behaviour that the Trust will be able to encourage and achieve conservation.

Approach: the Trust's advocacy work is linked primarily to its focus areas, i.e. the built heritage, and the places and sites under its supervision and management authority. On broader, national issues, this advocacy work will be largely proactive, focusing on critical issues identified in each three-year implementation plan, and collaborating with other organisations on joint advocacy campaigns whenever these arise or are feasible.

Long-term targets: (to be identified).

Indicators:
- o national budget support to Trust (amount, consistency);
- o number and effectiveness of civil society organisations, businesses and private sector bodies directly or indirectly engaged in heritage conservation.

Conservation and sustainable use of built heritage and natural sites in their landscapes

Rationale: this is the core mandate of the Trust, consistent with the objects spelled out in the Act. The conservation and promotion of the cultural heritage is an urgent priority at national and community levels. With respect to the natural heritage and to the conservation of biological diversity, the Trust has provided a leadership role in protected areas planning at the national level, with the design of the System of Protected Areas, and plays a unique role in site management and in coordination, fundraising and support to local action.

Approach: combining national planning, inventories and listing, and integrated site management, in collaboration with relevant national, civil society, community-based and private sector actors.

Long-term targets: (to be identified).

Indicators:
- effective and consistent use of listings in review of planning applications by the Development Control Authority (DCA) and the Department of Physical Planning;
- revision and formal approval of the System of Protected Areas (SPA);
- formulation and implementation of management plans for all major sites and properties under the management responsibility of the Trust.

The Trust: recognised and effective champion of Saint Lucia's heritage

Rationale: the Trust is an extremely important national institution, it is the only one that has a clear mandate covering both the natural and cultural heritage, and it plays a unique and essential role in national development. Its existence must be sustained, and its role must be understood, respected and supported in society. Its membership is an asset that must be mobilised in support of the work of the Trust and its vision.

Approach: the Trust must therefore educate the public about its role, it must highlight its achievements while also making its members, its partners and the general public aware of the constraints under which it operates, and it must design and implement partnership, communication and financing strategies that allow it to grow and to deliver its programme of work effectively and efficiently.

Long-term targets: (to be identified).

Indicators:
- financial resilience, ability to balance budgets and to attract non-public sources of revenue;
- continuity in budget allocations from government;
- significant increase in number of individual members, with a more even geographic distribution;
- introduction of a formal membership category for civil society organisations, and increase of number of organisations registered as members under that category.

Strategic outcomes	Objectives	Programmes and activities	Partnerships	Requirements
Societal appreciation for heritage and support for its conservation	Build public understanding and appreciation of heritage and its value	Ongoing public awareness and education programmes, focusing in particular on: • value of heritage • behavioural change Advocacy, capacity-building and partnerships (including assistance with curriculum development) to promote the teaching of history within and outside the school system Design and implementation of a national initiative to establish a network of heritage museums	Ministry of Education, schools and other institutions in the education system Saint Lucia Teachers' Union Media All national and community-based institutions concerned with heritage conservation	A shared, national vision of heritage, expressed in a statement (the place of heritage in nation-building, identity and development – including tourism) endorsed by other organisations A high-level policy commitment to support museums
	Develop or support a favourable and effective policy environment, including an appropriate policy and regulatory framework, for cultural heritage conservation	Pro-active, evidence-based, participatory campaigns on priority issues and policy reform objectives	General public Stakeholders directly concerned with issue or objective Parliamentarians Opinion leaders, including media	Willingness of other institutions to participate in advocacy campaigns
	Mobilise the Trust membership as agent of policy change and awareness raising	Engagement of members in the design and implementation of advocacy campaigns and actions	Other organisations with membership base, including A&H, FRC and community groups	Membership understanding of and support for Trust's mission
	Ensure that civil society plays an active role in conservation at national and local levels	Provision of support to civil society organisations involved, or desirous to become involved, in conservation	Existing civil society organisations Faith-based organisations Community organisations and groups	An active Coalition of Civil Society Organisations or equivalent body Suitable legislation to support CSOs
	Engage the private sector in conservation action	Formulation and implementation of a private sector engagement strategy	Private sector bodies with interest in conservation, e.g. Saint Lucia Hotel and Tourism Association (SLHTA)	Policy and fiscal incentives to support and encourage engagement

Strategic outcomes	Objectives	Programmes and activities	Partnerships	Requirements
Conservation and sustainable use of built heritage and natural sites in their landscapes	Facilitate or support the formulation and implementation of national planning and programming frameworks for heritage conservation	Conduct and maintenance of inventories, listings and data bases SPA oversight, M&E, technical support Facilitation of formulation and implementation of a national strategy and plan for the development of museums	Department of Sustainable Development (DSD) for SPA Protected area management agencies (Forestry, Fisheries, National Conservation Authority – NCA, Department of Physical Planning) Cultural development agencies (National Archives, Archaeological & Historical Society, Cultural Development Foundation – CDF, Folk Research Centre – FRC)	A national cultural policy that provides for the conservation of the built heritage A framework for collaboration among cultural organisations Formal endorsement of SPA
	Integrate heritage conservation measures and practice in development planning and implementation	Facilitation of access to information and technical assistance (hub / clearing house) Maintenance of listings with online access Provision of referral services for development applications Monitoring of the management performance of state and other agencies responsible for natural and cultural assets, provision of support and/or pressure when appropriate	DCA and Department of Physical Planning Private sector	Effective collaboration and communication between Trust and DCA Development of partnerships with the private sector Adequate EIA regulations, with effective application and enforcement
	Manage all sites for which the Trust has management authority or co-management responsibility	Management of sites: formulation and implementation of management plans, including business plans, public awareness, interpretation, partnerships, and financing	Protected area management agencies (Forestry, Fisheries, NCA, Department of Physical Planning) Community-based organisations Private land owners	A clear understanding among all national natural-resource management and cultural agencies of their respective mandates and roles,

Strategic outcomes	Objectives	Programmes and activities	Partnerships	Requirements
		Facilitation of multi-stakeholder management of selected, complex sites within SPA Ongoing identification of sites requiring conservation and management, and inclusion in management portfolio whenever desirable and feasible		and an agreement to collaborate
	Support community-based and other local initiatives in heritage conservation	Collaboration with and provision of support to communities in the identification and management of important landscapes, sites, buildings, monuments and other assets	Protected area management agencies (Forestry, Fisheries, NCA, Department of Physical Planning) Community-based organisations	Development of partnerships with community leaders and community institutions
The Trust: recognised and effective champion of Saint Lucia's heritage	Make the Saint Lucian public and all relevant institutions aware and appreciative of the role of the Trust	Documentation of programmes, projects and activities (case studies, testimonials, documentaries) Ongoing public awareness and education programmes, focusing in particular on: • role of the Trust • impact of its work Ongoing communication and dialogue with key institutions	Media CSOs (national and local)	A comprehensive and effective communication strategy
	Ensure the financial viability and sustainability of the organisation	Design and implementation of a comprehensive financing strategy and resource mobilisation plan Development and implementation of income-generating activities that are compatible with the mission and values of the Trust	Ministry of Finance Membership Funding agencies Private sector	Public sector support Capacity to develop grant applications Diversified revenue streams
	Manage the Trust as an effective and efficient	Design and implementation of an ongoing membership drive Provision of membership services		Capacity needs assessment

Strategic outcomes	Objectives	Programmes and activities	Partnerships	Requirements
	membership organisation	Formulation and implementation of internal capacity development plans as part of each tri-annual plan		
	Ensure that the Trust and its programmes are active, present and visible in all parts of the island	Development and implementation of a strategy to enhance island-wide presence, primarily through partnerships with selected organisations	Selected community-based organisations that share the vision of the Trust and have the capacity and legitimacy to lead, facilitate and implement activities in collaboration with the Trust	

When translating this framework into tri-annual implementation plans, the Trust will:
- identify specific results to be delivered for each strategic outcome over the three-year period;
- identify the actions to be implemented, with specified outputs, time-frames, budgets, financing plans and responsibilities for implementation;
- contribute to meeting the requirements identified for each objective, whenever these are seen as essential conditions for the implementation of the programmes and activities; and
- develop an internal capacity development plan.

Main delivery processes and instruments

In order to deliver the outcomes and realise the objectives outlined in the programming framework, the Trust utilises a number of processes and instruments, and in particular:

- *Listings*: the first object of the Trust, as stipulated in the Act, is "the listing of buildings, objects and monuments of prehistoric, historic and architectural interest and places of natural beauty with their animal and plant life". This critical mandate is discharged through two main instruments:

    o A *listing of buildings, monuments and historic sites*:
        ▪ developed with a framework for public engagement, and awareness, and with the active participation of members, partners, community groups and other stakeholders, through field visits, the sharing of information via social (e.g. #ConservationCrushWeekly) and other media, and an online platform that allows for the upload of information and data;
        ▪ on the basis of new or revised guidelines, criteria and processes for the selection and designation of assets;
        ▪ with an electronic data base that contains, for each item listed, a name, a georeferenced location, a parcel number, a description of the heritage value as well as threats and potentials, the tenure and management status, and as many relevant documents and data as can be assembled;
        ▪ this data base will be made accessible online to the Development Control Authority and the Department of Physical Planning, for consideration and use in accordance with section 33 of the Physical Planning and Development Act.

    o The *System of Protected Areas*, which was developed by the Trust in collaboration with a number of national and local institutions in 1992, was revised in 2009, and which will be periodically reviewed and updated during the period of implementation of this strategic plan.

- *Management plans*: such plans are developed for all major sites under the management authority of the Trust or for which the Trust is involved in a co-management arrangement. Their purpose is to ensure that conservation objectives are achieved, while optimising the recreational, social, livelihood and economic development benefits of management. These plans outline:
    o the specific conservation and development objectives for the site;
    o regulations and zoning;
    o a business plan, including the development of experiences and attraction, and plans for revenue generation, making these sites accessible to the public for a contributory free when appropriate and offering an informed, measurable product; and
    o a consideration of carrying capacity, social impact and equity.

- *Advocacy plans*: responsible, evidence-based advocacy is needed in support of cultural and natural heritage conservation and promotion, and this strategic plan aims to develop or support a favourable and effective policy environment, including an appropriate policy and regulatory framework for cultural heritage conservation. In each tri-annual programming

period, the Trust identifies key issues that require sustained advocacy work, and develops an approach and plan to address these issues. Each plan will describe:
- o the issue, its history, and the rationale for a targeted and focused advocacy initiative (conservation objectives that are not met or are impeded because of policy gaps, overlaps or conflicting outputs);
- o the existing policy context, with identification of those gaps, overlaps and conflicting outputs, and of the current institutional and legal arrangements (stakeholder analysis):
- o the policy reform objectives;
- o an action plan, with activities, time frames, budgets and responsibilities; and
- o a monitoring and evaluation plan to measure impact and learn lessons from the experience.

- *Research*: the production and management of knowledge is critical to the Trust, to ensure that inventories and management planning decisions are based on evidence, to guide and support advocacy work, to provide accurate and extensive information for the interpretation of sites and other assets in their environmental, historical and socio-economic contexts, and to develop the materials for publication.

  The Trust conducts research primarily through:
  - o volunteer work by competent members, volunteers or teams of members, supported by staff;
  - o partnerships with other national organisations that have research capacity (e.g. Archaeological & Historical Society, Fisheries, Forestry);
  - o participatory research led by community-based organisations;
  - o collaboration with professional associations (e.g. architects, engineers);
  - o ongoing identification of research needs that can be met by local students, and collaboration with the Sir Arthur Lewis Community College and other institutions to mobilise students; and
  - o design and implementation of specific research projects, with dedicated funding and the procurement of required expertise and support services.

- *Community engagement*: the Trust builds such engagement in all relevant programmes and projects through a process that involves:
  - o identification of community organisations and leaders with interest in and commitment to heritage in a particular locality;
  - o participatory identification of local buildings, monuments and sites;
  - o development of a calendar of events that may be used for communication, mobilisation and engagement;
  - o membership drive (organisations and individuals); and
  - o development of a programme of work that the Trust may be in a position to assist.

Part 3: Implementation

Governance

The Trust is the only national organisation in Saint Lucia that was created by an Act of Parliament, with open membership; with a governing body (Council) that brings together the Government, one civil society organisation and members elected by their peers; and with the membership having majority representation on that governing body. The Trust sees this both as a mandate and an opportunity to act as a convener, and is committed to play this role and to optimise the benefits of its complex and diverse structure, with strong synergies between Council, staff and members.

In the recruitment, management and mobilisation of its membership over this strategic planning period, the Trust will:
- formalise a category of organisational membership, with specific rights and responsibilities, and with representation on Council;
- develop partnerships with national organisations that represent sectors, professions and constituencies with a key role in heritage conservation and in supporting the work of the Trust (e.g. Teachers' Union, SLHTA), and encourage them to join as members;
- ensure that membership remains meaningful (contribution of members to the cause and work of the Trust), beneficial (benefits and activities designed for members) and accessible;
- develop and adopt a policy on corporate membership and/or engagement;
- sustain its efforts at membership recruitment, including in the diaspora; and
- explore the opportunities created by multiple memberships (i.e. when the same person is a member of several organisations).

The Annual General Meeting (AGM) is the overall policy and decision-making organ of the organisation. At the AGM, members receive progress and financial reports, consider and approve audit reports, review and approve the strategic plans and the implementation plans, consider current and outstanding issues, and elect their representatives on Council. In addition to the AGM, the Trust convenes quarterly meetings, and extraordinary meetings may also be called in accordance with the Rules.

The Council is the body responsible for the governance of the organisation, and its main roles are: to formulate policy; to lead the formulation of strategic plans, implementation plans and corresponding budgets; to review reports, budgets and audits prior to their submission to the AGM; to recruit and supervise the Director; and to monitor and evaluate the performance and impact of the organisation.

In support of the present strategic plan, Council will:
- focus on policy and programming guidance, with the Director and staff fully responsible for execution and operational decision making;
- develop internal procedures that will enhance its capacities and effectiveness; and
- consider ways to incorporate legal expertise.

In order to support and guide its work in the conservation of the built heritage, the Council will establish a Cultural Heritage Committee with the mandate to:
1. provide advice to the Trust Council on policy matters relating to cultural heritage conservation;

2. assist the Trust Council on the development of programmes and initiatives that support or promote cultural heritage conservation;
3. assist the Trust Council specifically on matters relating to conservation, restoration and development of built heritage; and
4. assist the Trust Council in the work of cultural heritage conservation through active participation[3].

As part of this overall governance arrangement, the following process and arrangements are in place to facilitate collaboration between the Trust and the Government:
- the Council members nominated by the Minister responsible play a key role in facilitating communication and policy coherence;
- annual reports, audited statements and all other major documents and outputs of the work of the Trust are made available to the Minister to account for performance and progress; and
- periodic meetings are convened between the Minister and representatives of Council to review progress and discuss issues, opportunities and priorities.

Human resources and staffing structure

In support of this strategic plan, the Trust will:
- ensure that its resources are primarily directed at the conservation and sustainable use of built heritage and natural sites, with a comparable level of human effort and financial investments between these two areas;
- build and sustain adequate internal capacity in:
  o communications, education and advocacy;
  o resource mobilisation, engaging all staff in the effort, and involving members and partners whenever possible; and
  o business development, merchandising, marketing and revenue generation;
- consider the creation of a unit dedicated specifically to corporate and business development;
- develop partnerships that make human resources available;
- make optimal use of the expertise and experience available within the membership.

Partnerships

Partnerships are at the core of the Trust's strategy, as all programmes, projects and activities involve other actors as direct partners, beneficiaries and sources of expertise. In addition to the collaborations identified in the programming framework above, the Trust:
- is committed to the establishment of formal and informal cooperation frameworks with and among organisations with mandates in heritage conservation;
- encourages the development and communication of common positions on public sector financing among national organisations involved in heritage;
- promotes participation and collaboration in the management of assets, including with the design and establishment of co-management arrangements involving public agencies, civil society and the private sector, with specific rules of engagement and partnership agreements when required;

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[3] See: George, Calixte I. 2008. Cultural Heritage Conservation Committee, Establishment & Guidelines. Saint Lucia National Trust.

- supports the formulation and adoption of a Code of Conduct among these organisations;
- favours the development and implementation of joint strategies, projects and initiatives (e.g. on museums);
- is committed to the sharing of resources and services whenever desirable and possible;
- is keen to broaden the scope of partnerships and to explore collaboration with non-traditional partners; and
- recognises the value of cooperation with other organisations in the Caribbean region, and will develop and implement a proactive and ambitious strategy for this purpose.

	Partners	Purpose of partnership
Environmental organisations	Department of Sustainable Development Forestry Division Fisheries Division National Conservation Authority Soufriere Marine Management Area Pitons Management Area Department of Physical Planning Caribbean Youth Environmental Network	Promotion and implementation of the System of Protected Areas as the recognised and agreed national framework for sites requiring special management status Collaboration in the management of sites Sharing of technical expertise Education, advocacy and information-sharing
Cultural organisations	National Archives Archaeological and Historical Society Cultural Development Foundation Folk Research Centre Saint Lucia School of Music	A permanent framework or arrangement for communication, collaboration and joint programming Joint strategy for the study, conservation and promotion of the cultural heritage Joint programmes and projects Provision of expertise, including in research
Professional organisations and private sector bodies	Architects, Engineers, Surveyors, Lawyers Saint Lucia Chamber of Commerce, Saint Lucia Hotel and Tourism Association, other private sector bodies	Access to specialised expertise Assistance in dissemination of information and messages Encouragement to adopt and promote practices that favour conservation
Training institutions	Sir Arthur Lewis Community College	Training and certification in skills and disciplines required for conservation Internships
Educational institutions	Sir Arthur Lewis Community College All schools Saint Lucia Teachers' Union	School-based assessments focusing on heritage that contribute to the work programme of the Trust Delivery of educational and awareness programmes
Other civil society organisations and local government agencies	National civil society organisations (youth, environment, social development, faith-based) Community-based organisations (foundations, community groups, etc.) Town and Constituency Council	Delivery of educational and awareness programmes Partnership in the identification, documentation and management of local assets
Heritage organisations in	National Trusts Environmental civil society organisations Heritage conservation agencies	Networking Sharing of information and expertise

	Partners	Purpose of partnership
other Caribbean countries		Design and implementation of joints programmes and projects Solidarity support
Regional and international institutions	Organisations with expertise in the Trust's programming areas, notably research, protected area management, and architectural restoration, including: • with respect to cultural heritage: UNESCO, International Association of Caribbean Archaeology (IACA), Museum Association of the Caribbean (MAC), the International Organisation of National Trusts (INTO) and universities that have historical ties with Saint Lucia • with respect to natural heritage: International Union for Conservation of Nature (IUCN), Caribbean Natural Resources Institute (CANARI)	Participation in regional and international programmes and initiatives Access to information, expertise, technical assistance and financing

Communications and branding

A comprehensive communications strategy supports the implementation of this strategic plan. The objectives of this strategy are to:
- support the implementation of all conservation programmes and actions;
- build awareness and appreciation of heritage;
- ensure that the mission and role of the Trust are well understood by all, including members; and
- build the image, credibility and legitimacy of the Trust.

The strategy will therefore:
- communicate the Trust's role and its achievements;
- use the Trust's own experience, as well as lessons from other countries and other institutions, to demonstrate the social, cultural and economic benefits that can be generated from heritage conservation and sustainable use;
- use communication to raise support and mobilise current and potential partners, including donors;
- engage with opinion leaders in society who are able to influence perceptions and will act as champions of the Trust and its mission;
- diversify its messengers or advocates to reflect society, e.g. youth, community organisations, social and charitable organisations, business organisations, etc.;
- make proper and effective use of digital era technology, with an attractive and informative website and with strategic use of social and other media; and
- include a brand strategy developed in a participatory fashion in the early stage of implementation of this strategic plan, reflecting the mission and values of this plan, with brand identity, promises and tagline(s).

Financing

The implementation of this strategic plan is supported by a comprehensive financing strategy that includes the following elements:

- an allocation from the government's annual budget (Estimates of Revenue and Expenditure) that is commensurate with the cost of performing the Trust's public goods functions as mandated by the Act;
- applications for grant funding for specific projects and investments;
- optimal generation of revenue from sites (but without compromise on conservation requirements);
- partnerships with businesses and private sector institutions, notably in site development and management;
- increased revenue from membership dues (because of increased numbers and voluntary contributions);
- a suite of heritage-related products and experiences to market to visitors and the local population;
- development of a uniquely branded and tailored line of merchandise, made available at outlets on Pigeon Island, heritage sites and targeted stores, hotels or restaurants; and
- exploration of the feasibility of establishing a Heritage Development Fund (focusing on the built heritage).

In addition, the Trust sees its partnerships as opportunities to share and mobilise technical, human and financial resources.

Reporting, monitoring and evaluation

The Trust has a comprehensive monitoring and evaluation framework that includes the following elements:

- annual reviews of progress towards the implementation of the tri-annual plan, with:
  o submission of this review, in draft form, to members and partner organisations, for comments;
  o presentation of the review to the membership at its Annual General Meeting, as part of the annual report to the AGM;
  o submission of the review to the Minister responsible for the subject of the Trust;

- commissioning of annual audits of the accounts, for submission to the membership at its AGM;

- evaluation of progress towards the implementation of the tri-annual plan, carried out during the second quarter of the third year of implementation, to inform the formulation of the plan for the next triennium, and to guide an eventual revision of the strategic plan if needed.

In addition, the Trust will, very early in the period of implementation of this new strategic plan, commission a survey of knowledge, attitudes and practices in relation to heritage, and will conduct similar surveys every five years to assess change.