

DYFED ARCHAEOLOGICAL TRUST

STRATEGIC PLAN 2015-20



Adopted at the Management Committee [board] Meeting of: 23 July 2015

DYFED ARCHAEOLOGICAL TRUST STRATEGIC PLAN 2015-20

INTRODUCTION

Evidence of how people in Wales over millennia have lived, died, worked and fought is all around us. Medieval castles, World War Two pill-boxes, lonely standing stones on moorland, coal mines, ruined cottages and hedges are just a few of the many elements that form the historic environment of Wales, as are other elements within the towns and villages of the present day. This historic environment provides the living spaces we inhabit today, and the roots of our communities and culture.

Much of the historic environment is valued by the people of Wales and by visitors and tourists alike. It is, however, also the ordinary and the seemingly insignificant elements of the historic environment that collectively contribute so much to the overall picture that can be lost; one of the challenges we face is to ensure these are also understood, valued and protected.

The Trust does not work in isolation, and other contributors to the understanding, conservation and promotion of the historic environment in Wales are Cadw, the other three Welsh Archaeological Trusts, the Royal Commission on the Ancient and Historical Monuments of Wales, local authorities, the National Museum Wales, universities, local museums and special interest groups and local societies. Strategies and statements produced by some of these organisations have been taken into account when formulating the Trust's Strategic Plan, as have other documents.

IDENTITY

The Dyfed Archaeological Trust is a non-profit educational charity and a private limited company. The Trust was established in 1975 as part of network of four independent archaeological organisations covering the whole of Wales. The objective for which the Trust is established is to advance the education of the public in archaeology.

MISSION STATEMENT

Promoting the understanding, conservation and appreciation of the historic environment of Wales.

CORE VALUES

We are honest in all our dealings and maintain the highest integrity at all times

- We are always honest with our clients about what can and cannot be achieved
- We will always keep our word
- Our accounting systems, financial systems and staff are beyond reproach

We are passionate about what we do

- Everyone in the organisation is passionate about archaeology and the historic environment

We strive for excellence in everything we do

- We take pride in what we do
- Through innovation and development we strive to continually improve what we do

Our staff work as a team to produce the best results

- We work with one another with enthusiasm and appreciation
- We help others to achieve their deadlines
- We coach, mentor and train people to help them achieve their potential
- All are entitled to express their views and their personal insights

REVIEW OF PROGRESS 2010-2105

Considerable progress was made on all aspects of the Trust's 2010-15 Strategic Plan, and in addition opportunities have been taken to advance on several fronts not identified in the plan. Financially the Trust is in a much stronger position in 2015, despite a reduction in funding, than it was in 2010, enabling us to purchase new premises: the realisation of a long-held ambition of the Trust of owning all of its offices and the potential to have all staff in one building.

In addition to continuing to develop the Historic Environment Record and its supporting software, the opportunity has been taken to create the Archwilio app, enabling access to all the Welsh Archaeological Trusts' records on android mobile phones, the first time a country's records have been made available in such a way.

The Trust's outreach programme has expanded, and the number of volunteers and others participating on fieldwork and on office-based projects has increased dramatically. Increased and more targeted publicity has raised the profile of the Trust in local communities and in the political sphere. Some of this promotion has been carried out in conjunction with the other three Welsh Archaeological Trusts. Indeed, greater partnership working, not just with the other three Trusts but also with other organisations, has become normal practice.

The diversity of projects undertaken by the Trust has increased. New sources of funding have been identified and new partnerships forged, enabling, for instance, a study of the submerged prehistoric landscapes off the Welsh coast to be undertaken, along with the investigation, conservation and interpretation of the limestone quarrying and burning industry on the Black Mountain. Twentieth-century military sites have featured prominently in the Trust's work for the first time. In addition a very large number of excavations/evaluations, geophysical surveys, historical studies and Historic Environment Record enhancement projects have been successfully completed.

Trust staff have been successful in forging stronger links with planning authorities, and with other organisations and institutions.

Improvements have been made to the Trust's governance: the Trust's Memorandum and Articles of Association have been revised. A Membership Search Committee has been established and new Members and Trustees appointed.

All this has been achieved during a period of economic austerity, declining Trust income in real terms (£798,479 in 2010; £777,558 in 2014) and fewer staff.

PREDICTED SECTORAL AND WIDER DEVELOPMENTS AND RELATIONS WITH EXTERNAL ORGANISATIONS 2015-2020

The period 2015-20 promises to be one of change: UK national elections take place in early 2015, and elections for the Welsh Assembly in 2016. The outcome of these could affect historic environment priorities and funding. Overriding economic forecasts for 2015-20 predict continuing austerity, with declining national government and local government budgets.

A Wales Planning Bill, an Environment Bill and, most relevant to the Trust, an Historic Environment Bill are all scheduled to become legislation before the 2016 election. It is likely that the Historic Environment Bill will have a neutral or even beneficial impact on the Trust. The effect on the Trust of the 2014 decision not to merge Cadw and the RCAHMMW is not yet clear, and will only become so during 2016.

No final decision has been made regarding the Williams report on public service governance and delivery in Wales, but it is expected that the number of local authorities will be drastically reduced, perhaps to eight or nine. Developments will have to be carefully monitored by the Trust, as will the results of a review of National Parks and AONBs.

The Welsh Government is increasingly requesting all departments and organisations that they support to address the key issue of tackling poverty. The Trust and Cadw will have to formulate means by which this issue is addressed through Cadw grant-aid. Welsh Ministers are also reviewing all of Cadw's activities.

Trust projects should reflect the priorities outlined in the 2008 document *Introducing a Research Framework for the Archaeology of Wales*. This document is still current, but may be revised in the period 2015-20. Another important document is Cadw's 2013 *Historic Environment Strategy for Wales*, which will be revised at least once during 2015-20.

WHERE WE WANT TO BE IN FIVE YEARS' TIME

The Trust will continue to be the premier historic environment organisation in south-west Wales, the first place to come for advice and information about the historic environment.

STRATEGIC AIMS

1. INCREASE UNDERSTANDING OF THE HISTORIC ENVIRONMENT
2. IMPROVE CONSERVATION OF THE HISTORIC ENVIRONMENT
3. ENCOURAGE ENGAGEMENT WITH THE HISTORIC ENVIRONMENT
4. PROMOTE THE HISTORIC ENVIRONMENT TO A WIDE AUDIENCE
5. ENSURE EFFECTIVE MANAGEMENT OF THE TRUST
6. PROVIDE STAFF AND VOLUNTEERS WITH THE RESOURCES TO DO THEIR JOB

STRATEGIC AIM 1: INCREASE UNDERSTANDING OF THE HISTORIC ENVIRONMENT

Objective 1.1: Develop projects that increase understanding of the historic environment

Objective 1.2: Add to and improve the content of the Historic Environment Record

Objective 1.3: Continue to improve the management of the Historic Environment Record and the dissemination of its content

Objective 1.4: Make better use of resources by forging partnerships and joint projects and by developing pan-Wales and international projects

Objective 1.5: Undertake commercial projects in southwest Wales and elsewhere

STRATEGIC AIM 2: IMPROVE CONSERVATION OF THE HISTORIC ENVIRONMENT

Objective 2.1: Raise awareness of the importance of the historic environment with planning authorities, the Welsh Government, developers and the general public

Objective 2.2: Identify funds to enable the employment of two full-time planning archaeologists

Objective 2.3: Ensure historic environment input in national, regional and local plans, committees and interest groups

STRATEGIC AIM 3: ENCOURAGE ENGAGEMENT WITH THE HISTORIC ENVIRONMENT

Objective 3.1: Continue to develop public participation projects

Objective 3.2: Develop projects to engage with hard-to-reach groups

Objective 3.3: Further develop the Trust's public engagement/outreach strategy

Objective 3.4: Obtain funding for a full-time community archaeologist within the Trust

Objective 3.5: Engage with more groups and individuals by promoting the use of the Welsh language in the Trust

STRATEGIC AIM 4: PROMOTE THE HISTORIC ENVIRONMENT TO A WIDE AUDIENCE

Objective 4.1: Arrange for staff to present papers at conferences and seminars

Objective 4.2: Raise the political profile of the historic environment and the Trust

Objective 4.3: Place regular articles in local papers and magazines and on television, the radio and websites

Objective 4.4: Improve the style and content of the Trust's website

Objective 4.5: Increase the use of social media to promote the historic environment

Objective 4.6: Produce articles for professional journals and magazines

STRATEGIC AIM 5: ENSURE EFFECTIVE MANAGEMENT OF THE TRUST

Objective 5.1: Maintain the financial stability of the Trust

Objective 5.2: Ensure that Trustees and Members have appropriate skills, expertise and knowledge to further the interests of the Trust

Objective 5.3: Regularly review, update and improve the Trust's policies and related documents

Objective 5.4: Continually review Trust suppliers to ensure best value for money

Objective 5.5: Promote DAT Archaeological Services more effectively

Objective 5.6: Improve the management and leadership skills of Trust staff

STRATEGIC AIM 6: PROVIDE STAFF AND VOLUNTEERS WITH THE RESOURCES TO DO THEIR JOB

Objective 6.1: Periodically review the Trust's software and hardware requirements and implement any resulting recommendations

Objective 6.2: Increase the efficiency of the Trust by greater use of digital data and producing fewer paper records

Objective 6.3: Continue to undertake annual staff appraisals and link them to training plans

Objective 6.4: Continue with the objective of accommodating all staff in one building

PROGRESS REPORTING

Progress reports on the objective targets will be provided in the quarterly papers to the Trust's Management Committee.

STRATEGIC AIM 1: INCREASE UNDERSTANDING OF THE HISTORIC ENVIRONMENT

Identifying and understanding the historic environment is essential if we are to conserve and protect it for future generations. Sharing information with decision makers and the people of Wales is essential for us to understand, appreciate and care for the historic environment as one of Wales's greatest assets (linked to Strategic Aim 2).

Objective 1.1: Develop projects that increase understanding of the historic environment

All of the projects undertaken by the Trust increase our knowledge of the historic environment. However, some elements of the historic environment are less well understood than others; it is towards these elements that resources should be directed.

Cadw grant-aid will fund most of the projects but match funding and other sources of funding will be sought. Key projects:

- Expand the current First World War Project
- Continue to investigate other post-medieval military remains
- Obtain funding to investigate post-medieval encroachment settlements
- Identify and record the remains of 19th century and 20th century industry
- Investigate the impact of the Roman military presence in south-west Wales
- Continue to investigate medieval and post-medieval roads and associated transport systems

In addition, a HLF-funded project led by Cadw involving the four Welsh Archaeological Trusts and the RCAHMW on 'unloved heritage' has been approved. An HLF-funded project investigating WW1 remains at Pembrey is underway, and the Trust has made an joint application to the HLF with Keep Wales Tidy for a holy wells project.

Outcomes: These projects will lead to a better understanding of the historic environment and of the threats to it.

Resources 2015-20: It is anticipated that Cadw grant-aid will be available during this period. If the applications are successful then £60k of funds for unloved heritage and £50k for holy wells will be available to the Trust. Some additional funding over and above Cadw grant-aid has been secured for the WW1 project.

Resources required in addition to current expenditure: Development of projects will be carried out using existing funding streams; therefore no additional resources are required.

Targets: Undertake 2-3 projects a year.

Timescale: Projects to be undertaken during the period 2015-20

Objective 1.2: Add to and improve the content of the Historic Environment Record

The Historic Environment Record is the key tool for the Trust's contribution to the effective management of the historic environment, and therefore it is essential that it contains accurate and up-to-date information. Rapid changes over the past few years in the way data is shared mean that more and more people can now access information on the HER. These new users demand more and better content on sites and monuments. An HER Action Plan for 2015-20 will be produced in 2015, listing the actions required for adding to, maintaining and enhancing the HER.

Outcomes: An improved resource for enabling better decision making in relation to the historic environment.

Resources 2015-20: £250k of Cadw grant aid during this period. Content will also be added from other grant-aided and commercial projects.

Resources required in addition to current expenditure: No additional resources required.

Targets: 300 new monument records and 200 new event records to be created annually. 1000 updates to records annually.

Timescale: HER Action Plan to be produced in 2015-6. Content to be added continuously throughout the period.

Objective 1.3: Continue to improve the management of the Historic Environment Record and the dissemination of data

The Trust will continue to add new modules to the HER software and improve existing modules in partnership with the other Welsh Archaeological Trusts. The Trust will continue to look for opportunities to extend ways of disseminating HER information, and will obtain funding to do so. The HER software has been made available to HERs across England – some now use it. Development costs will be divided amongst all users.

Outcomes: More efficient and cost-effective management and accessibility of data.

Resources 2015-20: Funds are available through Cadw grant-aid for some aspects of dissemination.

Resources required in addition to current expenditure: The four Welsh Archaeological Trusts have funded development of HER software. Continuing to do so will cost DAT c.£2k - £3k each year. This may reduce if there are more HER software users.

Targets: Develop one new module pa. By 2020 develop a new method of HER dissemination using an external funding source.

Timescale: HER Action Plan to be produced in 2015.

Objective 1.4: Make better use of resources by forging partnerships and joint projects and by developing pan-Wales and international projects

Partnerships have the potential to bring different expertise, skills and resources to projects, improving quality and increasing outreach and promotion. The Trust will continue to work with its traditional partners, such as Cadw, the RCAHMW, national parks, universities and museums, and will also forge new partnerships. It will also seek to identify opportunities for projects outside of Wales.

Outcomes: More efficient use of scarce resources

Resources 2015-20: Resources to identify partners and funders will be available through project funding. Up to five days each year of the Trust Director' time to be funded through overheads.

Resources required in addition to current expenditure: No additional resources required.

Targets: Develop at least one partnership project each year.

Timescale: Throughout 2015-20

Objective 1.5: Undertake commercial projects in south-west Wales and elsewhere

The Trust is committed to the understanding, conservation and promotion of the historic environment of south-west Wales, and collectively Trust staff have a broader knowledge of the historic environment of the region than any other organisation. Thus, all archaeological/historic environment projects carried out in south-west Wales, including commercial projects, will benefit from having an input from the Trust. The Trust will therefore tender for commercial projects in and on the borders of the region, promoting the use of local knowledge and local contacts to developers, public utilities, infrastructure projects and the like. Linked to Strategic Aims 2, 3 and 4.

DAT Archaeological Services provide expertise in fieldwork and reporting that adds value to the role of Historic Environment Records and Management within the Trust. DAT Archaeological Services also provide funds (for reserves and daily running costs) that enable important non-funded work to be undertaken. Linked to Strategic Aim 5.

Outcomes: A better response to development threats and a better understood historic environment

Resources 2015-20: No additional resources required

Resources required in addition to current expenditure: No new resources required

Targets: Carry out at least £200k of commercial projects each year.

Timescale: Throughout 2015-20

STRATEGIC AIM 2: IMPROVE CONSERVATION OF THE HISTORIC ENVIRONMENT

Effective conservation of the historic environment requires wide-ranging understanding of the resource (Strategic Aim 1) and of the potential threats to it. Sound judgement (Strategic Aim 5) by historic environment managers is important if risk is to be reduced. Awareness raising is also an important tool in conservation (Strategic Aims 3 & 4).

Objective 2.1: Raise awareness of the importance of the historic environment with planning authorities, the Welsh Government, developers and the general public

Maintaining close organisational and personal contacts and lines of communication between the Trust and the planning authorities is essential to ensure effective protection of the historic environment through the planning system. The Trust will therefore hold annual seminars with each of the planning authorities in the region to strengthen these contacts. In addition, the Trust will continue to promote the positive sides of archaeology to members of the Welsh Government, developers and others, stressing that archaeology can be a positive, rather than a negative, element in development, and one that can have positive outcomes for all parties. Linked to Objective 4.2.

Outcomes: Planners and others will become better informed on the importance of the historic environment and of their own and the Trust's role in protecting it.

Resources 2015-20: This will be undertaken as part of ongoing planning and Heritage Management work. Promotion of archaeology to developers and others will be a continuing responsibility for all staff.

Resources required in addition to current expenditure: No new resources required except those to launch the 40 years of the Trusts booklet in 2015.

Targets: Host annual seminars with planning authorities. In 2015 launch '40 years of the Welsh Archaeological Trusts' at the Senedd.

Timescale: Throughout 2015-20

Objective 2.2: Identify funds to enable the employment of two full-time planning archaeologists

The planning work-load continues to increase, but with no concomitant increase in resources. It has been the Trust's long-held ambition to identify funds to enable the employment of two full-time planning archaeologists. The Trust will continue to seek appropriate funds.

Outcomes: A better protected historic environment through the planning system.

Resources 2015-20: Funding to employ two full-time planning archaeologists will be actively sought throughout the period.

Resources required in addition to current expenditure: No additional resources will be required to identify sources of funding

Targets: Two planning archaeologists in post by 2020

Timescale: To be implemented by 2020.

Objective 2.3: Ensure historic environment input in national, regional and local plans, committees and interest groups

Local, regional and national plans and policies provide the framework by which the historic environment is protected. The Trust will continue to shape these documents by commenting on relevant consultations, participating in established committees and meetings, and putting forward proposals for membership of newly formed committees, alliances and interest groups.

Outcomes: Better concern for the historic environment will be taken in plans, policies and strategies.

Resources 2015-20: Part of the Cadw grant-aid for Heritage Management.

Resources required in addition to current expenditure: No additional resources required

Targets: Ensure that timely responses are made to all consultation and similar documents. Participate on at least five committees/alliances.

Timescale: Ongoing throughout 2015-20.

STRATEGIC AIM 3: ENCOURAGE ENGAGEMENT WITH THE HISTORIC ENVIRONMENT

Volunteering is an effective way in which people can engage with the historic environment. Engagement leads to better understanding and appreciation of the historic environment, resulting in greater care being taken of it (Strategic Aims 1 & 2). People volunteer for a variety of reasons, including pursuing their personal interests, developing their skills and hence their employment opportunities, or doing something constructive with their spare time. The Trust has been successful in encouraging participation but recognises that volunteers are often drawn from narrow demographic/social groups and that more needs to be done to engage with other members of society. The Trust will endeavour to engage with these hard-to-reach groups and so assist in delivering the Welsh Government's aims regarding deprivation and poverty, including poverty of opportunity.

Objective 3.1: Continue to develop public participation projects

Of all the volunteering opportunities offered by the Trust, excavation is the most popular. It is also the most cost effective, with up to six volunteers participating for every one member of staff. The Trust will continue to offer volunteer places on Cadw grant-aided excavations and will also identify new sources of funding to develop new participation projects.

Outcomes: The Trust will gain as it will be able to undertake more ambitious projects, and there will be better understanding of the historic environment. People will gain skills and knowledge. Participation will provide people with an opportunity to have a record of the skills they have learnt through, for example, the BAJR skills passport.

Resources 2015-20: Cadw grant-aid of c.£50k pa. Other resources to be identified.

Resources required in addition to current expenditure: Development of projects will be carried out using existing funding streams; therefore no additional resources are

required.

Targets: Undertake at least three public participation projects each year.

Timescale: Throughout 2015-20

Objective 3.2: Develop projects to engage with hard-to-reach groups

Opportunities to engage with the historic environment should be accessible to all, with no barriers. For a variety of reasons – age, deprivation, geographical location - some groups in society rarely engage. The Trust in partnership with the other Welsh Archaeological Trusts, Cadw and the RCAHMW is developing an 'unloved heritage' project to engage with hard-to-reach groups in Llanelli. The Trust will build on this project, developing further new projects during 2015-20. In addition, the Trust will design Cadw grant-aided projects to ensure more of them address the Welsh Government's strategy for tackling poverty.

Outcomes: More people will become actively involved with heritage. People will gain skills and knowledge, become more confident and increase their employment prospects. The historic environment will gain greater recognition and appreciation, and consequently will be more valued.

Resources 2015-20: Unloved Heritage project £60k. Other sources of income to be identified.

Resources required in addition to current expenditure: Identifying projects, partners and sources of funding will be the most time-consuming tasks - 10 days of staff time each year should be allocated to this.

Targets: Undertake at least one project each year.

Timescale: Unloved Heritage 2015-18. Other projects to be identified.

Objective 3.3: Further develop the Trust's public engagement/outreach strategy

The Trust's outreach strategy needs revising to take account of sectoral developments and new strategic documents, such as the emerging Welsh Archaeological Trusts/Cadw/RCAHMW public engagement strategy, and the Welsh Government's aims regarding deprivation and poverty, including poverty of opportunity.

Outcomes: Engagement with a wider range of individuals and groups

Resources 2015-20: To be undertaken as part of the Cadw grant-aided Heritage Management/Outreach projects.

Resources required in addition to current expenditure: No additional resources required

Targets: Revise and implement by the end of the 2015-16 financial year

Timescale: The strategy to be revised during 2015-16

Objective 3.4: Obtain funding for a full-time community archaeologist within the Trust

Currently community archaeology/public participation is carried out on a project-by-project basis by many staff. There is no overall co-ordinator. A dedicated Community Archaeologist would be able to provide a better, more co-ordinated service to volunteers and others with an interest in the historic environment. However, it is likely that a full-time post will have to be funded by several projects, rather than a single source of funding.

Outcomes: Helping to fulfil the Trust's principal objective 'to advance the education of the public in archaeology'.

Resources 2015-20: It will be possible to use existing resources to support this role, but other sources of funding need to be identified for a full time post.

Resources required in addition to current expenditure: No additional resources required to obtain funding.

Targets: The aim is to have a dedicated community archaeologist in place by 2018.

Timescale: See above

Objective 3.5: Engage more groups and individuals by promoting the use of the Welsh language in the Trust

Welsh is the preferred language of many people living in the Trust's region, and the use of spoken and written Welsh is essential if other aims and objectives are to be met. It is therefore important that several staff are competent in the Welsh language. The Trust will encourage staff to learn Welsh and, through its recruitment procedures, will aim to increase the number of fluent Welsh speakers in the Trust.

Outcomes: More Welsh language speakers will actively engage with the historic environment and with the Trust.

Resources 2015-20: The Trust will support staff to attend Welsh language classes.

Resources required in addition to current expenditure: Training resources of £1000 each year.

Targets: To have at least two members of staff fluent in Welsh by 2018

Timescale: Throughout 2015-20

STRATEGIC AIM 4: PROMOTE THE HISTORIC ENVIRONMENT TO A WIDE AUDIENCE

Promotion and raising the profile of the historic environment is essential if the Trust's primary objective is to be met. There are many different audiences that need to be addressed including the general public, politicians, other professional disciplines and fellow archaeologists. Raising the profile of the historic environment, and by association the Trust, will assist in achieving Strategic Aims 1, 2 & 3.

Objective 4.1: Arrange for staff to present papers at conferences and seminars

The Trust will arrange for staff to give papers at national, regional and local conferences and seminars on a wide range of archaeological and related topics. It is anticipated that some of these papers will be provided as part of project work. Linked to Objective 4.6.

Outcomes: Raise the profile of the historic environment of Wales and of the Trust within the archaeological profession.

Resources 2015-20: From operating costs and the training budget.

Resources required in addition to current expenditure: Some additional funds may be required to attend/organise major conferences - £1500 each year.

Targets: At least three papers/exhibitions/demonstrations to be given at conferences each year.

Timescale: Throughout 2015-20

Objective 4.2: Raise the political profile of the historic environment and the Trust

Politicians control much of the Trust's funding, and therefore it is important that they are constantly made aware of the value of the work of the Welsh Archaeological Trusts. This can be done through continuous work with the media and the press (Objective 4.3), by considered and prompt replies to consultations and requests for information, and by targeted activities such as those planned around the 40th anniversary of the Trusts in 2015-16. Linked to Objective 2.1

Outcomes: Raised awareness of the Trust in decision makers' minds.

Resources 2015-20: Much of this work can be done using existing sources of funding.

Resources required in addition to current expenditure: Resources for a 40 years of the Trusts booklet have been allocated. Allocate resources to fund a joint Trusts reception at the Senedd in 2015 – funding allocated under Objective 2.1. Other resources to be identified on an annual basis.

Targets: Host an event at the Senedd in 2015. Contribute regular items in the press and on radio and television.

Timescale: Throughout 2015-20

Objective 4.3: Place regular articles in local papers and magazines and on television, the radio and websites

There is an enormous public interest in local heritage. One way to satisfy this and to raise the profile of the historic environment and of the Trust is to place articles in local newspapers and magazines, and through contributions to local/regional television and radio. The Trust will place regular articles (at least every 2 months) in the Western Telegraph, the Cambrian News and other papers and magazines.

Outcomes: A raised awareness of the historic environment and the Trust

Resources 2015-20: Undertaken as part of the outreach activities of the Trust.

Resources required in addition to current expenditure: No additional resources required

Targets: A newspaper article in the press at least every two months, plus regular features on radio and television and on websites.

Timescale: Throughout 2015-20

Objective 4.4: Improve the style and content of the Trust's website

The Trust's website is the main source through which members of the public, prospective clients and others find information about the Trust. An informative, easy to use and attractive website is thus essential. Content is continually added to the website; but this can make it more cumbersome to use. A review of the website will take place in 2016, and revisions made if required.

Outcomes: Better and easier access to information on the Trust and its work.

Resources 2015-20: No resources required for review.

Resources required in addition to current expenditure: Depending on the results of the review up to £3k may be required to re-vamp the website during 2016-17.

Targets: Review during 2016, implementation in 2016-17

Timescale: See above

Objective 4.5: Increase the use of social media to promote the historic environment

Social media provide key ways in which news and information can be distributed. Staff will make regular contributions to Facebook, Instagram and Twitter, and emerging platforms, particularly on projects.

Outcomes: Better dissemination of information. Raising the profile of the Trust.

Resources 2015-20: No new resources required.

Resources required in addition to current expenditure: No new resources required.

Targets: Increase the 'likes' on the Trust's website by 100 each year. Increase the number of followers on Twitter by 100 each year.

Timescale: Throughout 2015-20

Objective 4.6: Produce articles for professional journals and magazines

The Trust has a good reputation in the profession and one means of maintaining this is to place regular articles in professional journals. The aim is to place at least one article a year in a professional journal or magazine.

Outcomes: Raised profile for the Trust and its work in the profession.

Resources 2015-20: It is anticipated that some articles will be produced as part of project work.

Resources required in addition to current expenditure: No new resources required.

Targets: At least one article a year in a professional journal or magazine

Timescale: During 2015-20

STRATEGIC AIM 5: ENSURE EFFECTIVE MANAGEMENT OF THE TRUST

Without effective governance and management none of the Strategic Aims 1-4 will be achieved.

Objective 5.1: Maintain the financial stability of the Trust

A financial surplus is required in order to achieve most of the aims and objectives set out in this Strategic Plan. A target of an average annual surplus of £20,000 plus inflation has been set.

Outcomes: Better resourced, understood and cared for historic environment.

Resources 2015-20: No new resources required

Resources required in addition to current expenditure: No new resources required

Targets: Make a surplus of £20K each year.

Timescale: Throughout 2015-20

Objective 5.2: Ensure that Trustees and Members have appropriate skills, expertise and knowledge to further the interests of the Trust

Knowledgeable, committed and active Members and Trustees are essential to the good governance and effective management of the Trust. The Trust's Membership Search Committee will continue to meet at least once a year with the aim of assessing whether the skills of the current Members and Trustees meet the full needs of the Trust's developing requirements, and to identify potential new Members.

Outcomes: A well-managed organisation adaptable to change

Resources 2015-20: No new resources required

Resources required in addition to current expenditure: No new resources required

Targets: Membership Search Committee to meet annually. On average the number of

new Members should match the number of retiring Members.

Timescale: Throughout 2015-20

Objective 5.3: Regularly review, update and improve the Trust's policies and related documents

Relevant and up-to date governing and supporting documents are essential for effective management. The Trust will put in place procedures for regularly reviewing policies and other key documents.

Resources 2015-20: No new resources required

Resources required in addition to current expenditure: No new resources required

Targets: List of policies and other documents, with review dates, to be compiled by July 2015. Set up procedures to review policies and documents on a rolling cycle.

Timescale: Throughout 2015-20

Objective 5.4: Continually review Trust suppliers to ensure best value for money

Reducing the costs of the Trust's overheads frees up resources to use on its principal objective. The Trust will review suppliers to achieve best value with no loss of quality.

Outcomes: Free up resources for use on the Trust's principal objective.

Resources 2015-20: No additional resources required.

Resources required in addition to current expenditure: No additional resources required.

Targets: The cost of Trust suppliers to rise with the inflation rate or lower.

Timescale: Continually 2015-20

Objective 5.5: Promote DAT Archaeological Services more effectively

Greater competition for commercial archaeological work means that the Trust has to promote DAT Archaeological Services more effectively. Prospective clients find out about the commercial services we offer through the DAT Archaeological Services website. The website will be regularly updated with new content and its success will be monitored.

Outcomes: More projects being commissioned.

Resources 2015-20: Updating to be done out of operating costs.

Resources required in addition to current expenditure: If required, revision of website in 2017-18 - £500.

Targets: The Trust should be asked to tender for over 80% of archaeological work in the region.

Timescale: Update website in 2017-18. Continuously monitor.

Objective 5.6: Improve the management and leadership skills of Trust staff

The December 2014 Investors in People assessment recommended several ways in which the management and leadership skills of the Trust could be improved. These will be implemented during 2015-17.

Outcomes: More efficient management of the Trust

Resources 2015-20: Training requirements need to be identified and costed as part of the Trust's training programme.

Resources required in addition to current expenditure: No additional resources required.

Targets: Recommendations in the Investors in People assessment to be successfully addressed.

Timescale: To be implemented 2015-17.

STRATEGIC AIM 6: PROVIDE PEOPLE WITH THE RESOURCES TO DO THEIR JOB

People –Staff, Members and Trustees – are the Trust's most valuable resource. It is these people who formulate, write and implement policies, statements and plans which govern all aspects of the workings of the Trust. It is essential therefore that the right people with the right skills and appropriate resources are in place to ensure that all aspects of the Trust's work are undertaken efficiently and to the highest quality.

Objective 6.1: Periodically review the Trust's software and hardware requirements and implement any resulting recommendations

Appropriate and up-to-date computer and related software and hardware are essential if staff are to do their job efficiently and to compete in an increasingly crowded market. New digital technology is being developed and existing technologies are evolving. It is not always possible to invest in these technologies but where it is advantageous for the Trust and the historic environment the Trust must do so. Areas of development include laser scanning, Lidar, GPS/total station theodolites, multi-image photogrammetry, the use of small drones, scanning of large documents and geophysical survey. A review of requirements will be undertaken following the move into Corner House, and recommendations put to the management committee.

Outcomes: More efficient working of staff

Resources 2015-20: Review and cost implementations resulting from review.

Resources required in addition to current expenditure: Other than single large items of capital expenditure, software and hardware such as new computers, will have to be purchased out of annual running costs. Purchase of a single large item is likely to run on average at £3k – £4k each year, and come from Trust reserves or running costs.

Targets: Review requirements following the move to Corner House.

Timescale: Review in 2015. Implementation throughout 2015-20

Objective 6.2: Increase the efficiency of the Trust by creating more digital records and fewer paper records

There is a tendency in organisations to create paper records in parallel with digital records; the Trust is no exception. More efficient management of all of the Trust's records will be achieved by creating fewer paper records and more digital records. Easier public dissemination of archaeological records will also be achieved as paper records are digitised. The move from Shire Hall to Corner House will be an opportunity to dispose of unwanted paper records, and to deposit records with the NMR and other recognised archives.

Key proposals:

- Make the planning archaeology office paper-free during 2015
- Make as many aspects of the Trust's work as paper-free as possible
- Create digital project archives for deposition in appropriate repositories in line with the RCAHMW's *Guidelines for Digital Archives*.
- Digitise paper HER documents and deposit original paper documents with the National Monuments Record
- Dispose of unwanted paper records

Outcomes: More efficient working practices. Better public dissemination of HER documents.

Resources 2015-20: Much of this work can be undertaken as part of regular work duties. Additional resources will have to be sought for digitising HER material. One potential source will be temporary workers through Jobs Growth Wales or graduate work placements.

Resources required in addition to current expenditure: Purchase a large format scanner (£3.5k). Other new hardware will be required, such as a new theodolite. Additional hard-drive for the server may be required.

Targets: Paper-free planning office during 2015. Digitise HER paper OS maps and deposit originals with the NMR during 2015, and digitise other HER records and deposit originals during 2015-20. Create digital archives for all new projects starting in 2015.

Timescale: See above

Objective 6.3: Continue to undertake annual staff appraisals and link them to training plans

One of the objectives of staff appraisals is to ensure that individuals are given the opportunity to identify skills gaps and are provided with opportunities and training to remedy them. Doing this will lead to more efficient working and better career development.

Outcomes: More efficient working. Better skilled workforce, and a happy and contented staff.

Resources 2015-20: No new resources required for appraisals.

Targets: Continue to undertake annual appraisals, formulate and implement annual training plan so as to enhance the skills of individual staff.

Resources required in addition to current expenditure: No new resources required

Timescale: To be undertaken in November-December each year. Training throughout

the year.

Objective 6.4: Continue with the objective of accommodating all staff in one building

Having all staff in one building is important for general efficiency, cross-department working, exchange of ideas and overall promotion of the Trust's core values. All Trust staff will move into the Corner House during 2015. Phase II renovation of Corner House will allow all documentation etc. to be moved into the building. The move into Corner House will result in cost savings.

Outcomes: A more efficient working environment. Reduction in Trust overheads.

Resources 2015-2020: Phase II of £70-£80k financed by a bank loan.

Resources required in addition to current expenditure: Additional funds for shelving etc to be identified.

Targets: Phase I to be completed during 2015. Phase II during 2016.

Timescale: See above.

SUMMARY OF COSTS TO THE TRUST FOR IMPLEMENTING THE STRATEGIC PLAN

Objective 1.1: Develop projects that increase understanding of the historic environment

No additional resources required.

Objective 1.2: Add to and improve the content of the Historic Environment Record

No additional resources required.

Objective 1.3: Continue to improve the management of the Historic Environment Record and the dissemination of data

£2k - £3k each year – this has been an annual commitment since 2005.

Objective 1.4: Make better use of resources by forging partnerships and joint projects and by developing pan-Wales and international projects

No additional resources required

Objective 1.5: Undertake commercial projects in south-west Wales and elsewhere

No additional resources required

Objective 2.1: Raise awareness of the importance of the historic environment with planning authorities, the Welsh Government, developers and the general public

Resources required for booklet in 2015, otherwise no additional resources.

Objective 2.2: Identify funds to enable the employment of two full-time planning archaeologists

No additional resources required

Objective 2.3: Ensure historic environment input into national, regional and local plans, committees and interest groups

No additional resources required

Objective 3.1: Continue to develop public participation projects

No additional resources required

Objective 3.2: Develop projects to engage with hard-to-reach groups

10 days of staff time to be allocated to this - £1500 each year

Objective 3.3: Further develop the Trust's public engagement/outreach strategy

No additional resources required

Objective 3.4: Obtain funding for a full-time community archaeologist within the Trust

No additional resources required

Objective 3.5: Engage more groups and individuals by promoting the use of the Welsh language in the Trust

£1000 each year

Objective 4.1: Arrange for staff to present papers at conferences and seminars

£1500 each year

Objective 4.2: Raise the political profile of the historic environment and the Trust

See 2.1 for resources identified in 2015.

Objective 4.3: Place regular articles in local papers and magazines on television, the radio and on websites

No additional resources required

Objective 4.4: Improve the style and content of the Trust's website

Up to 3k during 2016-17

Objective 4.5: Increase the use of social media to promote the historic environment

No new resources required

Objective 4.6: Produce articles for professional journals and magazines

No new resources required.

Objective 5.1: Maintain the financial stability of the Trust

No new resources required

Objective 5.2: Ensure that Trustees and Members have appropriate skills, expertise and knowledge to further the interests of the Trust

No new resources required

Objective 5.3: Put in place mechanisms to regularly review Trust's policies and other key documents

No new resources required

Objective 5.4: Continually review Trust suppliers to ensure best value for money

No additional resources required.

Objective 5.5: Promote DAT Archaeological Services more effectively

£500 in 2017-18

Objective 5.6: Improve the management and leadership skills of Trust staff

No additional resources required.

Objective 6.1: Periodically review the Trust's software and hardware requirements and implement any resulting recommendations

Up to £3k - £4k each year

Objective 6.2: Increase the efficiency of the Trust by creating more digital records and fewer paper records

Purchase of new scanner £3.5k. Other possible hardware and software to be identified.

Objective 6.3: Undertake annual appraisals and link them to training plans

No new resources required

Objective 6.3: Continue to undertake annual appraisals and link them to training plans

Additional funds for shelving etc to be identified.