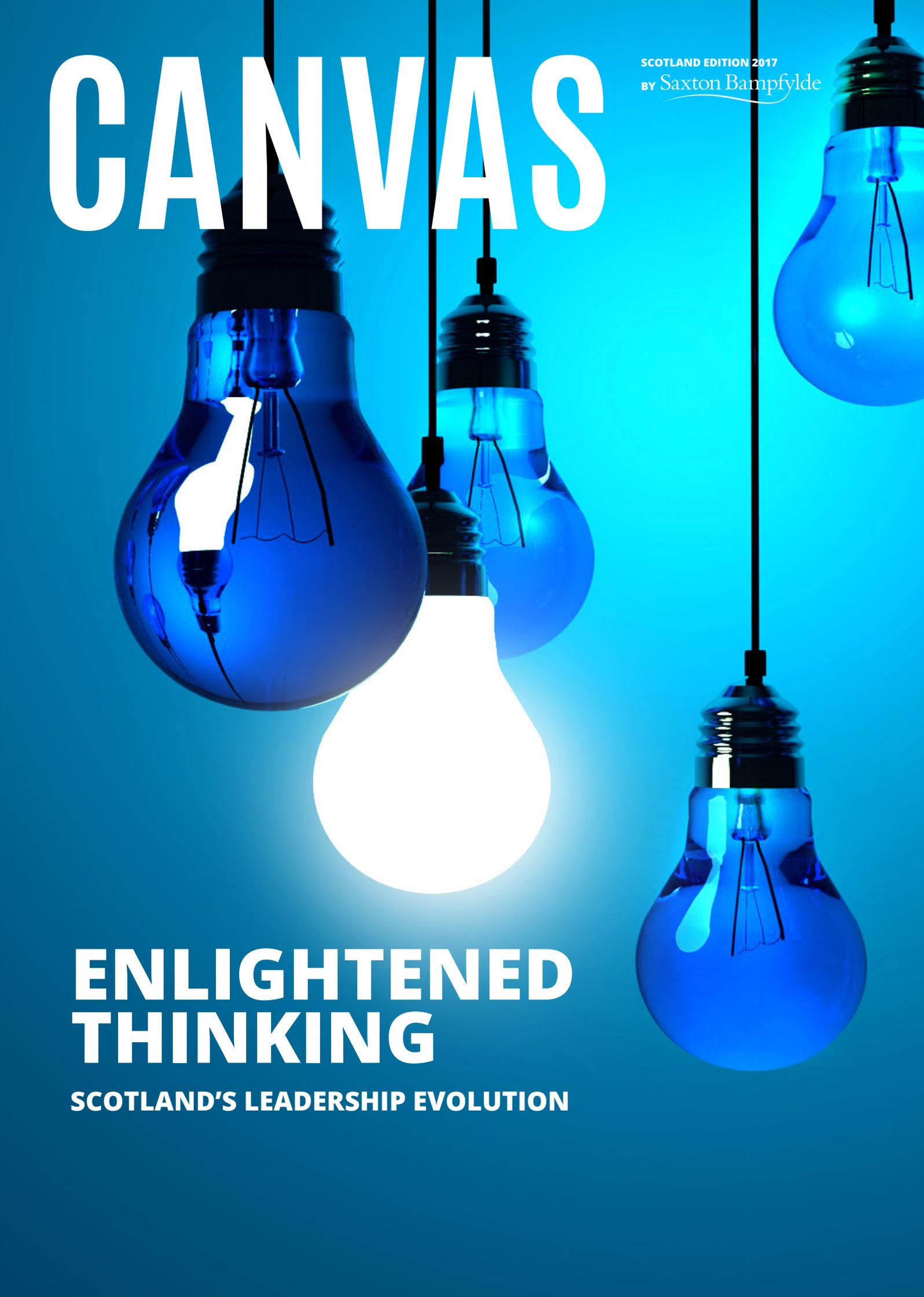


Saxton Bampfylde

# CANVAS



SCOTLAND EDITION 2017  
BY Saxton Bampfylde

## ENLIGHTENED THINKING

SCOTLAND'S LEADERSHIP EVOLUTION

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# WELCOME

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Welcome to the first edition of CANVAS Scotland – an insights update from Saxton Bampfylde. Our aim is to share interesting thoughts and perspectives on topics and issues that will resonate across many of the sectors we work with in Scotland.

We very much welcome any thoughts, comments, or inputs you would like to share.

Please enjoy this edition of CANVAS.

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## EDITION OVERVIEW

### PETA HAY

#### Partner & Head of Scotland Office

✉ [peta.hay@saxbam.com](mailto:peta.hay@saxbam.com)

**W**hat is striking when you read the thoughts of our contributors, is the scale of change, volatility and unpredictability with which they are dealing. The commentary across Scotland and the rest of the world is one of unprecedented upheaval as governments, populations and organisations grapple with a general discontent. One of the great privileges of my role here in Scotland is that I am able to discuss with and learn from a wide range of sectors, organisations and people, with insightful and contrasting interpretations of Scotland, its position in the world and its future.

This led me to ponder a question, “Is the level of change taking place in Scotland and Europe in political, economic, social and cultural spheres likened to a second Enlightenment and if so, what should be our response?”

The approving views of the likes of Voltaire and Benjamin Franklin on Scotland, in parallel with Scotland’s own immense Enlightenment figures, was testament indeed to the relevance of this small country in the world. The Enlightenment challenged deeply held beliefs and routines and some would say caused chaos at a time when the

order of things was simply defined by God. It took a special group of people to challenge centuries-old thinking and present an alternative.

Scotland seems to have developed, once again, a national persuasion to challenge the established order, making sense of an alternative and embracing the need for change.

But what of our response to this opportunity? The comments made by one of our contributors Lesley Franklin, the future Principal of George Heriot’s School, Edinburgh, on the importance of education, immediately resonate. In the 18th century, Scotland had one of the highest levels of literacy in the world and this undoubtedly contributed to its influence at the time. The need for Scotland to once again dominate the international league tables in education is now more important than ever. And so we come back to the calibre of the people leading such organisations, be they educational, charitable, political or commercial. Three of whom we are grateful to have been able to interview for this edition of Canvas.

The ability of individuals to thrive and see

**“Leadership of companies and institutions will set the tone for how we approach this time and ultimately how we experience it.”**

opportunity when others see only chaos, is an essential attribute and is increasingly sought by organisations. The leadership of companies and institutions will set the tone for how we approach this time and ultimately how we experience it. Sharing insight and experience will continue to develop a culture that stimulates the thought of a second Enlightenment.

So let us hope Scotland maintains ‘a great faith in progress or the belief that the present is better than the past and that the future will be better than the present’, whatever that may be. **1**



# THE BUSINESS OF PEOPLE

Interview with **SANDY BEGBIE**, Global Head of People,  
Organisation and Culture Integration – Standard Life Aberdeen Plc

**SANDY BEGBIE** reflects on the first days of the newly merged Standard Life Aberdeen Plc and emphasises the importance of people and culture in making this organisational change a success. In his new integration role Sandy looks at what lies ahead for the business in its new position as the UK's largest asset manager.

**Can you explain a bit about your role and how it has evolved in the past two years?**

My role until the recent merger between Standard Life plc and Aberdeen Asset Management PLC was Chief People Officer of Standard Life plc. In addition to that I have also been a lead executive in our joint venture business in China and small retail business in Hong Kong where I chair the Audit and Risk committee and Strategy and Planning committee. I have been in this additional role in China for six years, and it has no HR function.

This dual role really reflects my approach to my career, and HR in general. Firstly, I have always tried to keep a foot outside the HR function, and secondly, I have always looked to really grab different opportunities when they have come along.

As a function of the merger, I have been asked to take on a lead integration role. The view and approach from both Martin Gilbert and Keith Skeoch as joint CEOs is that culture is fundamental to the success of the merger. We know that whilst there will be some significant complexities we can get the IT systems and the properties to work. The biggest risks to success are the people, organisational design and culture. We need to get those vitally important parts right from the outset.

When you look at an asset management company at a basic level we are a people business, much more so almost than many other types of business. Our differentiator is the people we employ, the people we work for and with, and the culture that we engender in the business.

My role is definitely evolving as we begin life as a merged company. This is the largest merger in Scottish history, and one of the largest in the UK. The chance to lead on the integration of the two businesses was certainly too good an opportunity to miss.

**When considering your role in the organisation's Chinese business, is it less common in the finance sector to have the Chief People Officer or HR Director in a more 'business-specific' function?**

Yes, I would say so. There are other firms who have done it, but it is relatively rare. I did originally come from a banking background and that really has allowed me to broaden my leadership into other areas.

For me personally to be involved in other parts of the business keeps it interesting and also makes the HR/people function more relevant

across the organisation. It gives me and my team a better overview of the whole business. The business in China is complex, and I sometimes think if I can understand and navigate that process, I can get to grips with any area of the business.

I do truly believe that you can learn a lot more about yourself and the organisation by expanding your network. In general, I think there needs to be more business breadth amongst HR people, and having a strong understanding of the business workings, as well the importance of the people to the business benefits everybody.

**Standard Life Aberdeen is a global organisation and has emerged as the UK's largest asset manager. What would you highlight as the key challenges in addressing the changes this merger has brought to the employees across both organisations?**

There is absolutely no getting away from the fact that there is a period of time with any change which will bring a lot of tension and we need to work through this. This involves realising synergies in the business and making cost savings, ultimately resulting in a reduction in people. This has been made public and there is awareness that there will be a headcount reduction of 800 from the current combined population of 9,000 employees, over a three year period, as a result of the merger. Synergies will come in part from customary employee departures and natural turnover, and we will be taking all appropriate steps to mitigate the number of compulsory redundancies.

We will be working through our approach over the next three to six months. It can't be a sequential process, but we have to start engaging with people about what the new company will look and feel like. It is exciting for some people, but for others there is a continued anxiety about what it will mean for them. We realise that we need to address this as early as possible, whilst also stabilising the business and keeping customers and clients on the journey with us.

The external and internal worlds will be watching this whole process; assessing how we approach these challenges while merging the organisations, people and culture together.

As separate entities, there are inevitably differences between how the two businesses have worked in the past. The organisational structure, governance, and culture have been different. Although operating internationally, Standard Life Investments has been pretty Edinburgh-centric, with decision-making largely

centralised here and a comparatively small global presence. It has also grown almost entirely organically, with one acquisition in its history. Aberdeen Asset Management has been a more global business operation and has grown mainly through acquisitions in the past decade.

Integrating these two businesses together will be the most significant marker of success. We know it's important to all our clients and future clients that we keep our best people, continue to attract the best people and generate the best investment performance and returns. This is what we are committed to doing with the merger.

**"If we get this right, we will create a vitally important financial power house based in Scotland."**

**Standard Life Aberdeen is operating with a dual CEO structure. What will that mean for the business and the organisational structure?**

We are not the first organisation to do this, there have been a number of success stories. It has worked well in large international organisations such as Oracle, for example. Investment banking particularly also has a history of joint CEOs due to the diverse nature of the business make up.

This dual role has worked where you are genuinely merging two companies, and that absolutely is what Standard Life Aberdeen is. It is a merger – the mutual joining together of two organisations to make one larger entity. It would quickly meet a tipping point of not being considered a merger if there was a predominance of one organisation taking senior roles.

When you consider our two CEOs, they are quite different people. They do have commonality around values and approach, and very established and successful track records, but in terms of their innate interests and strengths they do differ.

Martin has a strong focus on the external side of



**“The biggest risks to success are the people, organisational design and culture. We need to get those vitally important parts right from the outset.”**

the business – client, customer and external affairs. He is interested in marketing and brand building, and is a very engaging communicator.

Keith is an economist by background, and has always traditionally had a stronger focus on the investment and core business elements. He has built Standard Life Investments and of course he has a strong focus on clients, but he also recognises the importance of getting the culture right internally, getting people to work together.

They make a very impressive team and have real personal strengths and qualities which complement each other. To date it has worked as well as anyone could have expected, and it looks set to continue on that path.

**What are the key methods that you and your team will be adopting to share the new brand and vision for the merged business with all your internal audiences?**

We certainly cannot underestimate the importance of brand values and culture. It stretches right round the organisation, internally and externally. The client experience is heavily driven by the employee experience, and that needs to be as seamless, aligned and real as possible.

The ubiquity of technology does bring different avenues of communication and this can really help when addressing a larger, globally spread out audience. However, we can never underestimate the power of visibility. At times of change, this is paramount. We need to have leaders of the business on the ground, meeting, talking and updating. Those leaders who can communicate really well absolutely come into their own at a time of change.

**How does the explosion of social media and constant availability of online news content impact on your interactions with staff and other stakeholders?**

The way the two companies have typically communicated has been quite different up until this point, but it is starting to come together. From day one we have had to work hard at ensuring the approach is joined up about how we share information.

Social media has provided a really big jolt to internal communications particularly. It has created the need for quicker, smarter engagement and being able to reach audiences in a way that the internal communications function has not done before.

One of the initiatives which was launched just after the merger was a mood and sentiment survey. This has gone to all 9,000 across the merged group. We want to get real time information about how people are feeling and thinking and get a closer insight into existing cultures. We had been developing it for a while with Standard Life Investments, but this is the first time it has been carried out, and we are really positive about how this will help inform our approach. We will repeat this regularly to allow us to gain an instant sentiment to people and culture over the next couple of years.

It is amazing when you run a business like ours that we can get financial information and customer information instantly, but we didn't have that same level of access to employee sentiment until now. It will be a very important tool for us and puts more emphasis on the leadership to take visible and accountable action.

**The merger comes at a time of political and economic uncertainty in Scotland and UK, particularly in relation to Brexit. Can you outline how you address the challenges this external environment brings when communicating within your organisation?**

Interestingly, and this is very typical when organisations or institutions are going through significant periods of change, people will naturally focus in on what it means for them, their role and their team. This is perfectly normal and we are very aware of this.

Of course Brexit and the political and economic uncertainty are key topics of internal discussion. Preparing for a successful Brexit transition is a strategic priority. However certainly at the moment, there is a more immediate focus on what is happening internally and how this might impact right across the organisation.

This is highlighted during our regular leadership calls which we hold as part of the merger integration process. During these calls the majority of questions are about people, culture and organisational structure. These really are the areas that are uppermost in our employees' minds.

Of course, by no means are we an organisation which is close minded to what is going on externally, but when it comes to communications, we have to get the balance right about where we focus during this period of significant change and listen and pre-empt the needs of the business and our people.

**With increased regulation across the sector what challenges does this bring? Does it make people management and recruitment more complex, requiring a greater level of technical or specialist knowledge across all levels of the business than in the past?**

It does make recruitment more complex. Really good people have a lot of choices about where they can work. Most sectors nowadays have some form of regulation, but the financial services sector has a very high degree of it.

We find particularly with graduates that the opportunity to work in financial services doesn't necessarily hold the same attraction as it used to. Graduates looking at the wider job market are placing a great deal of emphasis on values and what companies stand for. Certainly a company's approach to sustainability is one of the top criteria a graduate would use to make choices about their employment. I'm pleased to say that we are well recognised for our approach to sustainability and have featured in the Dow Jones Sustainability Index (DJSI) for seven years now. The index is designed to measure the performance of sustainable companies by looking at how well they manage environmental, social and governance (ESG) risks and opportunities which impact on their long-term success. Our listing places us within the top 10% of leading sustainable companies in the world from our sector.

However, one of the key points is about the reputation and the issues the financial sector has experienced in the past decade. As a result of the 2007/8 crisis, the regulator introduced a senior manager regime which allows it to hold senior people much more to account than in the past. This brings a far higher degree of reputational risk, particularly in functions like HR and IT, and this also can make this sector a less appealing area to work in.

Many financial organisations remain large, deeply complex organisations and I believe that finding the right people, the best people, is going to become harder.

**Is there a need for greater diversity at a senior leadership level (not just gender specific) in the financial sector and beyond? If so, how can this be addressed?**

There is definitely a need for financial services' organisations to be much more mindful of the social climate and the change we have seen in the past, and continue to see now. There is still a considerable amount of discussion around

## “How businesses respond to the social inclusion agenda will go a long way to rebuilding the sector and demonstrating the good that these businesses can have in broader society.”

remuneration, the purpose of organisations, diversity and inclusion. This debate needs to be widened and positive action taken to address these issues.

I believe that how businesses respond to the social inclusion agenda will go a long way to rebuilding the sector and demonstrating the good that these businesses can have in broader society. Financial services is very important to Scotland, and of course the UK, but to regain trust in the sector amongst customers and clients will take time and require a lot of work from many organisations in areas where they have historically not been involved.

Standard Life has worked hard to be inclusive over the past five years particularly and I am a huge advocate. Our strategy leads with inclusion - based on attracting and retaining a diversity of talent in its broadest sense and on ensuring we have an environment in which all our people can fulfil their potential and feel they can be themselves at work. For example, we were the first private sector company in Scotland to become not just a living wage employer, but a Living Wage Friendly Funder too. We've made sure that we pay a minimum of the real living wage to all our employees, regardless of their age, and this applies to all our young interns and apprentices. At the same time, As a Friendly Funder we also make sure that any roles we fund with the charities we work with are funded at the Living Wage. We've also built the living wage into our supply chain. What that means is that all suppliers who work with us need to be living wage employers or give that guarantee to all their employees who come onto our sites.

Another project we are involved in to reinforce the importance of the living wage and help young people get into work is through the Princes' Trust. We fund one of its initiatives in London, and more recently five other cities, which brings young people in to work with SMEs by offering them training and coaching. In some cases the SMEs don't have the funds to pay the living wage but we have committed to subsidising the salary of any young person employed by this scheme to guarantee it.

We have also done a substantial amount of work with those coming out of the armed forces. We have a network of about 40 ex-armed services personnel employed in our business, and look to support organisations who help those out of the army into work. A few years ago we worked with the British Royal Legion to fund the introduction of a brand new training programme and website, to help those in the armed forces to improve their financial fitness. This was the first time that

structured financial education was built into all Armed Forces basic training, bringing real and tangible benefits.

One of the key points of diversity is of course gender. We cannot deny that we have challenges with regards to our gender diversity at the top of the organisation. We are working hard to shift this balance and a lot of emphasis is on growing a sustainable gender balanced pipeline. Our graduate level is more than 50 percent female; at emerging leader level we have 50 percent females; and at the senior leader level it is approximately 25-30 percent. In our succession pipeline, 38 percent of those we consider will be ready to operate at Executive Committee level in 3 years plus is female and we are focussed on supporting their continued development. At board level we have been above 30 percent female for the past decade, and that is a trend that will continue. We have a very strong women's development network, which has been recognised externally also. We are moving in the right direction in this area, and it is fundamental part of our long term strategy.

An area that we need to focus more on in the future is around disability and we have projects in the pipeline to address this with regards to our employment approach and wider social mobility strategy.

### **Looking ahead, what will be your biggest indicator(s) of success in the change management process in the next 1-4 years for Standard Life Aberdeen plc?**

We are embarking on a three year programme of change, but I would like to think that the bulk of my work in this integration role will have been carried out over the next two years, and the businesses are effectively merged. I am very aware that it can't run for too long, as there is a greater risk of project fatigue.

For the business at large, being counted as one of the successful mergers to take place in business history would be a great indicator that the process has worked. There is some research which suggests a higher rate of failure for mergers than acquisitions. This higher failure rate has largely been put down to lack of integration and proper establishment of culture and purpose.

When setting out on the path of a merger, there is a fine balancing act required. We have a dual chief executive function and a board which is 50/50 from both organisations. There is a full commitment by both sides to making it a success.

Some of the more measurable indicators which we would assess on a regular basis include maintenance of business as usual; asset retention; staff retention; graduate and staff recruitment; customer satisfaction; brand awareness; attraction of new clients; management of change; and integration of new culture.

Standard Life Aberdeen is now the largest asset manager in the UK, second largest in Europe and one of the top twenty in the world. If we get this right, we will create a vitally important financial power house based in Scotland. This will have a real impact on people's lives, both in the capital and beyond, within the organisation and externally. This is our ultimate goal and one that we are working very hard together to deliver. **G**



### **ABOUT SANDY**

Sandy Begbie is responsible for the Global People, Organisation & Culture Integration since the successful merger of Standard Life and Aberdeen Asset Management on 14 August 2017. He is also the Lead Executive for the Joint Venture Heng An Standard Life in China and the Asia business based in Hong Kong. Sandy joined Standard Life in May 2010 as the Group Transformation Director. He is the Chairman of Career Ready, Scottish Advisory Board (SAB) and also chairs the new Regional Developing Young Workforce (DYW) group to tackle Edinburgh and Lothian youth unemployment. He was recently appointed as a Non-Executive Director to the Open University Board.

# CONTINUING TO BUILD TRUST

Chief Executive of National Trust for Scotland, **SIMON SKINNER**, talks about his transition from a large Plc business to leading one of Scotland's most high profile charities. Reflecting on the changes which have taken place in recent years and those still underway at the National Trust for Scotland, he considers the need for more communication, partnership thinking and succession planning within the charitable and heritage sectors.

## **What were the key drivers for you in transitioning from the private sector to a role in the charitable sector? Or was it more specific to the role at the National Trust for Scotland?**

It was driven largely by a change in my personal circumstance. Sadly a year into my three year international assignment as CEO of Aegon Ireland plc, my wife was diagnosed with secondary breast cancer. Luckily for us we were able to access a drug, unavailable to women in the UK, that has the potential to extend life expectancy for on average 18 months. For us it did exactly what it said on the tin and whilst in the end her passing was kind of sudden, I had had time to reflect on what was important in life.

Without wanting to sound trite I knew that I wanted to put something back and engage in something that would give me a real sense of purpose, so I started looking at the Third Sector. Scotland as a working destination was an obvious choice as this is where my children are and I wanted to be near them.

In the end I applied for two posts in the charitable sector. To my surprise I was shortlisted for both, but the National Trust For Scotland was the one that was closest to my heart. I am passionate about Scotland's heritage and the sense of place it provides us. My long-held belief is that if it wasn't for independent organisations like the NTS and its efforts to protect and promote access to our heritage, much of what we take for granted today would have been lost.

## **How much do you believe your previous role and experience in a Plc organisation influenced or informed your approach to change management at National Trust for Scotland?**

I think my previous roles and experience of organisational change in the private sector have influenced my approach here enormously. Indeed it was the realisation by the Trustees that the National Trust for Scotland needed to change, to become more business-like, that influenced their selection of me as their new CEO.

Just looking at the Trust's support systems you can see why change was needed. For example whilst we enjoy the largest membership of any conservation charity membership in Scotland, with more than 370,000 members, our membership demographic tends to be limited to young families and older age couples, with very little in between. Indeed those people that don't have any experience of us, don't realise we are a charity, and think of us as a well-funded arm of government, looking after castles. In reality, only 4 percent of our operating costs are provided through government grants and in addition to

**“Protection of heritage and the promotion of a sense of place are all the more needed and relevant than they have ever been.”**

the 129 built properties we look after, we care for 200,000 acres of countryside and all the wildlife they contain, 46 Munros, 400 islands, including St Kilda, (the UK's only dual World Heritage Site), 394 miles of mountain footpaths, 35 major gardens, 9 national nature reserves, 46 sites of special scientific interest, 200,000 artefacts etc. That plurality of coverage should support a much more diverse support base and it's our job to widen our appeal and attract new audiences and grow our supporters.

In business terms we are equivalent to a medium-sized business, with operating costs and income of £40 million per annum. However over the long term income from paying visitors and their associated secondary spend has been declining

and it was becoming more and more difficult to square the circle, let alone address the £40m of conservation deficit.

Almost all the organisations I have ever worked with have undergone large transformation projects, and you learn a little bit more each time. I came to this role with a developed set of views about change management. Broadly these are: You first need to establish and communicate the need for change; in so doing define the gaps between what you have and where you want to go; secondly set out a route map to the new organisation, with clear deliverables and outcomes and lastly determine the skills and competencies you need to ensure delivery.

In my experience too many organisations confuse the need to communicate with the need to consult and believe they have the capacity and skills to deliver major change, whilst doing their day jobs. I also believe effective organisational change is led from the top and hence change often has to start with the leadership team.

Communication is key to successful change and taking people with you is the key to embedding that change. It links to the theme of culture change. How do you make the change stick? You can't make it stick if you don't change the culture. I also believe that culture starts at the top. If you don't have the right top team and attitudes, then you need to make the change there first.

In the charity sector, and I am sure that applies to the public sector too, people are understandably nervous about using consultants. But properly managed they can, through their skills and programme management models, bring a level of assurance and confidence to the delivery of organisational change, that otherwise would be missing.

Simply stated the need for change at the Trust stems from the hypothesis that long term sustainability of heritage depends on ensuring its use and on developing support systems. Hence our immediate strategy is one of monetisation. We need to get paying visitor numbers back up to past levels; we need to get secondary spend up; and we need to widen our appeal and drive a



Photo: MacNeill Photography

radical increase in membership. Short term we will achieve this through investing in new attractions, offering great experiences and medium term by making sure that people recognise there is a 'cause' here worth supporting.

In terms of other income sources the Trust is in the enviable position of having a big pool of endowments. Many are restricted, but nevertheless a number of the properties have built up good reserves and our strategy is to invest this capital in developing the new attractions. This year, we are looking at investing in six properties.

Capital programmes and the attaching business case /ROI are familiar territory, organisational

change and strategic planning experience and leadership through change from the perspective of the private sector fit the bill for what the Trust needs right now. I am a great believer that leadership is time-served and more often than not leaders don't know when their time is up. I fully recognise why I have been asked to come in and what I am here to do.

**What have been the key challenges, opportunities and learnings as you have transitioned through this period of change with the Trust?**

I guess one of the key challenges was to convey the case for radical change and the need to act at pace. My sense was that staff had been

expecting iterative change rather than anything transformational.

Another area of challenge for me is working with an elected Board. I have a board of 14 Trustees, four of whom are co-opted and ten elected. I am used to working in a PLC where non-execs are sought out and remunerated for the specific skills and experiences they bring to the table. That said I welcome the varied make-up of the Board and admire both their commitment to the Trust and willingness to use their skills and experiences collectively to reach good decisions. I am also lucky in that my Chairman has a business background and hence our starting positions are often aligned, in that we tend to challenge the status quo and



National Trust for Scotland Volunteers working in Glencoe

are determined to move things forward.

Perhaps the biggest opportunity I have is the amazing 'passion' people in the Trust have for what they do. The challenge is to harness this passion, energy and commitment behind a set of corporate priorities.

**Has the need for communication been greater during this process? If so, how have you addressed this and what tools/mediums have been most valuable?**

As an individual, I recognise that I can only do so much. Change is constant and I need my leadership team to be out walking the floor and communicating all the time. For me coming into the organisation from the outside, it was important that in the initial period, I visited and met with staff – in my first year I managed to visit 40 of the 148 properties within the Trust. I was trying hard to form an impression from staff about what they thought of the organisation as well as what makes it tick. We have about 400 full time staff, but we have also 3500 volunteers at our peak. It was really important that I got to know what they thought about the Trust and also what our active membership thought, especially those in the Members' Centres and Friends' Groups which do so much to support our properties.

We spent time bringing groups of staff together. At the beginning of the change process we made it clear we were not going to impact those at the property level. It was mainly going to be HQ-based staff. We explained that it was not just about team structures but about people's individual roles changing too. We were also looking for greater efficiencies in the way we do things. Some of the means by which we communicated what we were doing included weekly updates

on the programme, weekly meetings, media interviews and briefings for stakeholders, including the Scottish Government. I also personally respond to anyone who writes to me. I did worry that following the announcement of the changes I might get 370,000 letters, but actually, by making clear the reasons for, rationale and purpose of our changes from the start, we didn't get a lot of pushback from members.

**The whole period of change has been, and continues to be, carried out under a high level of scrutiny and observation by the Scottish media. Has this impacted on your approach? If so, how?**

I can honestly say that it hasn't really impacted my approach. Looking back at the coverage over the past two to three years, it is on the whole largely favourable. There were a few sensationalist headlines, but overall the articles were balanced. In terms of my personal approach, I feel it is best to be open and honest with journalists, acknowledging they have a role in challenging what we are doing and holding me to account.

**The size of the Board of Trustees has evolved in the past few years at National Trust for Scotland? What impacts do you think that this has brought to the overall governance of the Trust?**

My predecessor was accountable to an 80-strong council (reformed as part of the 2010 review led by Sir George Reid), as well as Board of Trustees. I have to be honest and say that if that arrangement had still been in place when the job was advertised I don't think I could have taken it on. The Board of Trustees has and continues to evolve. For instance we now link the criteria for election to the experience required to match the

**“Succession planning is important for the long term sustainability of any organisation but one that is often ignored, particularly in organisations going through change.”**

needs of our corporate strategy. The Trustees are of course responsible for setting that strategy and for monitoring its delivery. They also need to satisfy themselves that the Trust's operations are being well managed and this is where the Transformation of the Trust (Phase II), which is bringing in business reporting and data management capability to provide assurance around our controls and operations, will lead to further changes for the way the Trustees engage with the Trust's operations.

We are also engaged on the establishment of advisory groups or panels of experts who are willing to make themselves available to us when we need them, bringing expert opinion to our idea formulation and decision-making.



National Trust for Scotland staff at Culzean Castle and Country Park, Ayrshire

**Is there a need for greater diversity at a senior leadership and governor level (not just gender specific) across the charitable sector in Scotland?**

Yes there is. I think greater diversity is quite plainly good business sense. Whilst I subscribe to the absolute need to appoint the best people for the job, collective informed decisions within leadership teams are best served by diversity of composition.

**How important is succession planning within the National Trust for Scotland? If so, is there an active approach in place to deliver this?**

It is important for the long term sustainability of any organisation but one that is often ignored, particularly in organisations going through change. We are beginning that journey now, to putting a more formal succession planning programme in place.

We are constantly thinking about leadership and the people we need to provide it. Our leadership team represents the most influential positions within the business and we need to ensure we are taking account of the diversity agenda and the key skills we need.

For the first time, we have created our own internal Talent Development Pool. We are working in partnership with Edinburgh University to grow this and build a group which has a focused, common base of skillsets, with the right understanding, knowledge and approach. The programme has been specifically tailored for us in partnership with Edinburgh University. We are about to launch our second cohort, so by next year about 20 people will have been involved from the Trust.

**You have talked about greater collaboration, even consolidation, within the heritage and historical organisations in Scotland. What impact do you believe this will have in the long term for the sector?**

There is a plethora of charities within the 'heritage' sector many carrying out the same activity, whether that's conserving, protecting or managing heritage attractions and or promoting access to the beautiful stories, places and objects of our shared heritage. However, resources to support this activity are finite and I believe it is incumbent

on us all to explore how we could work more efficiently together to achieve these ends.

This sentiment was echoed by the House of Lords Select Committee on Charities – with findings in the report 'Stronger charities for stronger society' (March 2017) that duplication of charities and mergers 'should often be considered as a measure of success. Naturally a reflection of a charity keeping a proper reflection on its benefactors.'

The Government recognises the importance of preservation and heritage across many areas, such as education, health and wellbeing. However, there is universal recognition that there isn't enough government money to go around.

I do believe that we need to think more about partnerships; what we are doing and how we can do it better. A lot of infrastructure is duplicated and there really is no need for that.

**As you look ahead to the next five-ten years for the Trust, what do you believe are the key areas of focus across Scotland?**

The key debate beyond how the sector can work together more efficiently to do 'what' we do, has to be about 'why' we do what we do – the public benefit. This has to include not only our economic contribution to society but our contribution to health, wellness, education and to our sense of place as a society.

We remain first and foremost the National Trust for Scotland and as the largest independent heritage conservation charity we are uniquely placed to give voice to the issues we face in the sector. We are on a journey, transitioning from a charity to a cause. The sad reality is that many people don't see us as relevant to them or their lives. We need to communicate better what we do and why and create experiences that better resonate with the communities of Scotland.

When I joined the Trust, I was committed to being there for three to five years. I have just entered my third year, and feel like we are making progress. What will be really positive, not just for me personally but for the organisation over the next five to ten years, will be if we have delivered on our existing strategic plan, have a clear view of what success looks like for the next five years; and have ensured that there are people within the



## ABOUT SIMON

Simon, who holds an MBA from the University of Stirling, was previously Chief Executive of Aegon Ireland Plc, an international insurance business managing in excess of €4 billion of funds for over 20,000 investors. Prior to this he served in a succession of senior leadership posts within the wider Aegon UK group of pension, insurance and investment businesses, including the roles of Chief Operating Officer for Aegon UK (Scottish Equitable) and Director of Customer Services. At earlier stages in his career, Simon also fulfilled senior corporate services, sales and marketing roles with the Automobile Association, Scottish Equitable, Scottish Widows and Lloyds TSB. His very earliest appointments were with the National Health Service, including the Greater Glasgow Health Board where he was responsible for commissioning cancer and cardiac care. Simon's career in healthcare management also took him to Saudi Arabia where he was Director of Procurement for the Saudi Arabian Military Hospitals programme. He took up his post as Chief Executive of the National Trust for Scotland in June 2015.

organisation in place and ready to take it to the next level.

Politically, economically and culturally we are in unusual times, which paradoxically plays to the strengths of The National Trust for Scotland. We are rooted in heritage, something every one of us brings to the table and our protection of that heritage and the promotion of a sense of place are all the more needed and relevant than they have ever been. We provide a reference point to the past and that can help us understand what we can be in the future. I think that is where we fit and I hope that people will increasingly look at the Trust, value what we are doing and want to be part of it. This is where we need to be very clear about explaining who we are as an organisation and thinking about how we present ourselves. **C**



# EDUCATING OUR FUTURE

All set to take on the role of Principal at one of Edinburgh's leading independent schools **LESLEY FRANKLIN** considers the changing education landscape and the challenges and opportunities it brings. Attainment, mental health and the rise of digital media are some of the key issues she explores, providing insight into a vitally important sector which has a more complex backdrop than ever.

## What do you believe are the key challenges and opportunities for head teachers and senior staff in Scotland over the next five to ten years?

From an education perspective the challenge across Scotland is raising attainment. It has been widely reported that attainment in Scottish schools has declined. In the latest PISA survey (Programme for International Student Assessment), Scotland is at its lowest position since the survey began in 2000. Also, in the recently published report 'Quality and Improvement in Scottish Education (QulSE) 2012-2016, the Chief Inspector of Education reports a divide between the independent and state sectors in terms of attainment and achievement. The report has highlighted a real problem in state sector schools, a quarter of which were judged to be either weak or satisfactory. In contrast, in independent schools, learners are 'generally highly motivated and responsible, with a positive attitude to learning'. Therefore, these reports have produced the evidence, and what senior education staff in Scotland need to do now is work together to address these issues in schools which are not providing high quality education for children in Scotland.

The exams being delivered through SQA also continue to be a challenge. There have been, and continue to be, many changes. In England and Wales there is a greater number of exam bodies, and therefore the competition there may be good for creating high quality exams. The model with SQA may be less complex as they are in charge of all exams, but it does also give them, in essence, a monopoly. This makes it harder to garner change.

Some of the real challenges for head teachers are in the areas of health and well-being of pupils and staff. More so than ever, gaining a sustainable work life balance for staff has become hugely important. There has been a real increase in awareness of mental health issues, which is good. In this area head teachers have a responsibility to both staff and pupils.

National funding cuts in child and adolescent mental health services, coupled with increased pressures in terms of exams and social media, means that we have the potential for significant challenges in this area. The desire and pressure for teenagers to portray a perfect lifestyle is a real and present problem.

As a school we are looking at psychology services that we can use to support pupils. It is not always the more extreme and obvious cases that can prove difficult to support. Often it is those on the margins. Schools have such a responsibility in this area as we are typically the first to notice behaviour changes in pupils. It can also bring with it significant liability challenges.

## "The real challenges for head teachers are in the areas of health and well-being of pupils and staff."

Finally, we have to recognise that social media presents a challenge in how it impacts pupils and staff but on the converse, it also provides opportunity as an interesting and adaptable platform for communication and interaction. We just need to ensure that we are using it well and expanding our capabilities to evolve with it.

## Do you see that changes in the political landscape will impact on the education sector in Scotland? If so how could this impact on independent schools compared to state schools?

This is an area of continual change in Scotland, and across the UK. When Deputy First Minister, John Swinney, was made Cabinet Secretary for Education in 2016 he responded very quickly

to requests being made by teachers to review SQA unit assessments and other systems. His rapid action showed that he was really listening to those in education and from my perspective that was welcome. However, there is a great deal more that needs to be done.

The question of independence does create a challenge, and also potentially an opportunity. If there is a successful independence referendum at some point in the future it may make a city like Edinburgh more or less attractive for businesses, which would obviously impact positively or negatively on the maintenance of a steady intake of pupils for the independent sector. Similarly, Scotland remaining in the UK could make Edinburgh more prosperous and attractive. There are so many unknowns in this area - it makes it a challenge to plan for the future development of the independent schools' sector.

Education Scotland has a positive impact in some ways. For example, in Scotland both independent and state schools are inspected by Education Scotland and I do believe this model works better in the creation of a consistent approach to inspection. There has been a lot of work undertaken by the inspectorate to understand the independent school sector and how the different school models compare. This allows for more accurate inspection.

However, as well as inspection, Education Scotland is also in charge of policy creation, and with a responsibility to create policy for schools and then inspect them, this means there is very little outside or independent scrutiny of the system and how it is working overall.

Regardless of what is going on politically what we are absolutely focused on is ensuring our pupils are happy and that our education is of top quality. We want to give pupils the opportunity to go on to any chosen higher education institution and this must be an important part of our role as educators.

## “We have to recognise that social media presents a challenge in how it impacts pupils and staff but on the converse, it also provides opportunity as an interesting and adaptable platform for communication and interaction.”

### **With increased regulation across the sector is more expected of school Governors in their role, and if so, what benefits and challenges will this bring for schools?**

Yes, I think there is more expected from Governors these days, particularly in terms of legal responsibilities, liability, complaints, data protection and information sharing. There is also far greater awareness of and focus on accessibility, discrimination and safeguarding. These are areas in which Governors may not have had much knowledge in the past, but now there is a far greater level of responsibility that comes with the role.

We really do need Governors who have the expertise to scrutinise what schools are doing and be able to challenge and provide advice and to leadership teams. It would be a very positive move to have younger and more diverse backgrounds represented on governing boards right across Scotland. This could mean a big shift in culture for a lot of schools.

### **Will this create a smaller pool of Governor candidates for schools? Would it be helpful if Governors could be remunerated?**

I think we need to look at what we can do differently to attract Governors across both the independent and state sectors in Scotland. I don't believe more regulation or responsibility needs to lead to a smaller pool of potential Governors, just a different approach.

As far as remuneration goes, I do not think this is realistic, even for the independent sector. When you start introducing remuneration or a salary it becomes an employed job and that is not what the role of a governor is. It would also be impossible for most schools to pay Governors as schools in Scotland are not run for profit.

### **Is there a need for greater diversity at a senior leadership and governor level (not just gender specific) in the sector in Scotland?**

Yes, absolutely. It is a very slow area of change across the sector, and not just in Scotland. I think that there are only two other female principals of mixed independent schools in Scotland and nobody from other ethnic groups represented that I am aware of. This is in particularly stark contrast to the very high numbers of female teaching staff across the sector at both independent and state schools.

It seems strange that when I was announced as Principal of Heriot's that, even in 2017, the fact that I am a woman is one of the key headlines in the media.

### **Is charitable status a sustainable reality for independent schools in Scotland? What challenges does it bring for the school and board of Governors?**

I do think it is sustainable and I believe it really should be. We have charitable status to make sure that the more financially disadvantaged pupils can come to schools like George Heriot's. That was the founding principle of the school in 17th century. We provide an enormous amount of money to pupils through the Heriot's Foundation and through bursarial aid and these families' input to the school is vital. That is why we have charitable status, but we do need to be clear in proving that we are making a difference to the children and making it financially worthwhile for all of these families.

I think that we could do more to support the principles of charitable status and, in turn, address the poverty related attainment gap across Scotland. Targeted philanthropic donations to independent schools, for example, could really help to drive even more access for many a large number of pupils who otherwise could not access such education because of the fees.

In a city such as Edinburgh, where there is a very high percentage of pupils attending independent schools, without charitable status many of these institutions would not be sustainable. The loss of independent schools would lead to far greater overcrowding in the state sector. Independent school parents pay taxes and also pay school fees. Therefore, they help by contributing to state schools and removing their own children from a crowded system.

Ensuring that independent schools remain viable is going to be a key challenge in the future. We need to be thinking individually as schools, as well as collectively in the sector, about how we can maximise the opportunity to generate a greater level of partnerships to allow independent schools to thrive.

### **Is this status really compatible with an increasing need for commercialisation in the schools' sector?**

Yes I believe it is. Independent schools are not run for profit. We are continually looking at new ways to make the model work better and harder. More sponsorship or partnership opportunities

are being explored all the time. That is a positive move for the independent sector to ensure the maintenance of top quality facilities, education and personal development of all pupils and, most importantly, to increase the number from disadvantaged financial backgrounds who can attend.

### **Are schools and universities working as well together in Scotland as they could be to support young people as they move from secondary into Higher Education? How can universities learn from schools and vice versa?**

I definitely think there is more we could do. Higher Education institutions are looking for a greater degree of independence from young people. There is some evidence that pupils who have been to independent schools are not always well equipped to cope with living away from home, as they have possibly had more specific attention and input from parents and teachers throughout their school careers. However, the balance is that the input has enabled them to achieve the necessary grades to gain access to the top universities.

One way we address this at Heriot's is by asking Senior 6 pupils to manage their own timetables. This encourages them to think about studying, planning and managing workloads at university. We have found this is a very good experience for them. We encourage parents to let the pupils make decisions and take responsibility.

I think both the secondary and higher education sectors would benefit from talking to each other more. I think that if universities spent time speaking more regularly to senior pupils and school staff, sharing more information about what they expect at university and discussing opportunities beyond education, that would be a very positive move. There needs to be more talking and sharing in general. Universities need to look at the level of support and guidance provided to first year students. Are the courses and expectations appropriate and realistic?

Schools need to learn more about how course work is undertaken at universities and encourage pupils to look at, for example, how to construct evidence based essays. This is something that is perhaps not done enough at school. This small example shows that greater communication between schools and universities would lead to better support of pupils as they transition into first year at university.



## “We cannot rest on our laurels and look to past glory days.”

**Do you believe we look to other education systems enough to develop our own in Scotland? Should we be looking more at how education is delivered in other parts of UK or beyond to enhance our own model?**

It is always good to look elsewhere. I personally think this is really important in early years education. We look at the Emilio Regio and Montessori education systems at an early age, but less as we progress up the school. There is a huge amount of evidence which shows that by the age of seven, a child's future is mapped, and we need to ensure that we are doing as much in the early years as we do in secondary stage and higher education.

In Scotland we have such a strong educational history, but in truth, we are not doing well at the moment. We cannot rest on our laurels and look to past glory days. We need to look forward and work out how we address our current issues and failings. I think we do need to look elsewhere as it might help us to understand how we can do better. We have the capacity to change, but we need to have an open, positive mindset. We need to listen, be receptive to those who are in the sector and work out together how to raise Scotland's educational attainment levels to where they could (and should) be. And hopefully be as good as we used to be.

**Looking ahead to your role as Principal at one of Scotland's leading independent schools what do you see as your key goals in the next five years?**

For me there are some absolutely fundamental goals. I want to continue to have a fully occupied school with consistently high academic results. This will, I hope, generate ongoing demand for places across many areas of the city and beyond. A key part of this is also ensuring that we continue to drive the opportunity for disadvantaged children to attend George Heriot's and remain true to our charitable founding principles.

I want to maintain close links with our alumni and engage with the wider business, cultural and philanthropic communities to generate charitable funds and ensure we sustain a financially viable and truly charitable institution.

If we manage to drive these operational and charitable areas, the ultimate proof of success will be in the ongoing development of happy, confident, independent and caring students who will have bright and opportunity-filled futures ahead of them. **C**



## ABOUT LESLEY

Lesley Franklin will become Principal of George Heriot's School with effect from January 2018.

Lesley began her Heriot's career in 1995 and has been Head of the Junior School since 2013. Prior to Heriot's she worked in state schools in Edinburgh and Berkshire. She is also currently an Associate Assessor for Education Scotland, inspecting schools across the state sector in Scotland.

Lesley attended the University of St Andrews and graduated with an Honours degree in German and gained her teaching qualification from the University of Reading.

# EVENTS ROUND-UP

We provide an update on some key events happening at Saxton Bampfylde.

## A WINTER PORTRAIT

In November 2017, Saxton Bampfylde will be welcoming guests to its fourth annual winter party at the Scottish National Portrait Gallery, Edinburgh. This event is one of the calendar highlights, ushering in the beginning of festive celebrations for many of our clients, colleagues, and friends.



## PROFESSOR EVE POOLE SHARES TRADE SECRETS ON HOW TO LEAD IN THE LUXURY MARKET

Continuing with our successful engagement in Scotland, we were delighted to welcome Professor Eve Poole as a host at a lunch event in late September at the Scottish National Gallery of Modern Art (Modern Two). Aimed primarily at leaders and directors within the luxury retail, design and arts sector, Professor Poole, who has recently released her book

*Leadersmithing: Revealing the Trade Secrets of Leadership*, shared her thoughts and insights in an interactive session focusing on the tools needed to succeed as a leader. Specific themes she covered included the science of leadership, and how to help leaders develop the muscle memory needed to remain calm and in control in a crisis occurs.



A dinner event with Eve will be held in October with 30 of Scotland's most prominent leaders to discuss their own experiences of leadership. This event will be centred on the challenges faced by leaders across multiple sectors. We will welcome Chairs and CEOs from the Arts and Culture, Financial Services, Conservation, Manufacturing, Not for Profit and Health sectors.

## THE EVOLUTION OF LEADERSHIP IN HIGHER EDUCATION



To continue the work that we have been undertaking within the Higher Education space during the past 30 years, we are delighted to announce that we will be commencing another piece of research this year, looking at the future and evolution of the Vice Chancellor role. We plan talk to a broad base of current Vice Chancellors and Chairs of Council across many leading institutions in the UK to get a real insight into this topic and identify emerging themes, which we will then develop into a research report.

This work will follow on from the thought leadership piece we delivered

in 2016 looking at the evolving nature of the University Council and the roles of the different members within it. It covered many topics of interest, including the relationship between Chairs and Vice Chancellors, the changing role of the Chair of Council and the current and future make-up of the board.

Over the past year we have been delighted to host a number of dinners for university Chairs to discuss the findings of our research. It has been very well received and we believe that our next piece of work will develop on some of the key themes which arose. To view our most recent piece of work visit: [www.saxbam.com/thought-leadership](http://www.saxbam.com/thought-leadership).

# KEY APPOINTMENTS

We are delighted to share with you a selection of some of the roles that Saxton Bampfylde have been privileged to work on recently.



**CELIA JOICEY**  
**DOVECOT STUDIOS**  
**DIRECTOR**

Celia Joicey has joined Dovecot Studios as Director. Prior to her appointment she was Head of the Fashion and Textile Museum, and before that, Head of Publications at the National Portrait Gallery in London and Editor of the RSA Journal and Head of Publications at the Royal Society of Arts. Celia is a graduate of Cambridge University and the Royal College of Art. Celia started with Dovecot in September 2017.



**PROF. CHRISTOPHER BREWARD**  
**NATIONAL GALLERIES SCOTLAND**  
**DIRECTOR OF COLLECTIONS & RESEARCH**

Professor Christopher Breward has been appointed as Director of Collections and Research for National Galleries Scotland. His tenure begins in autumn 2017. Previously he was Professor of Cultural History at the University of Edinburgh, where he also held the positions of Principal of Edinburgh College of Art and Vice-Principal for Creative and Performing Arts. He has previously worked in the museum sector as Director of Research at the Victoria & Albert Museum.



**LESLEY FRANKLIN**  
**GEORGE HERIOT'S SCHOOL**  
**PRINCIPAL**

Lesley Franklin will begin her role as Principal at George Heriot's in January 2018. Lesley was educated at Lenzie Academy, Glasgow, gained an honours degree in German at the University of St Andrews and studied teaching at the University of Reading. In addition to her teaching duties, Mrs Franklin has been an associate assessor for Education Scotland since 2008, has coached hockey for over 20 years and is currently studying for an MSc in HR and Business Management at Napier University.



**PAUL MCGHEE**  
**STANDARD LIFE ABERDEEN PLC**  
**HEAD OF BREXIT STRATEGY**

In May 2017, Paul McGhee was appointed as Standard Life Aberdeen PLC's Head of Brexit Strategy, a role created as part of the organisation's planning for exiting from the European Union. Paul was previously Head of Staff at the AFME, having earlier served as Head of Infrastructure finance within the Scottish Government. He will report to Graeme McEwan, Chief Communications Officer.



**REMKO PLOOIJ**  
**BUCCLEUCH ESTATES**  
**COMMERCIAL DIRECTOR FOR**  
**DALKEITH COUNTRY PARK**

Remko Plooi has been appointed to the role of Commercial Director, Dalkeith Country Park for Buccleuch Estates. He joins from Edinburgh Leisure where he has been Director of Operations since 2015 and prior to that was Leisure Services Manager for Centre Parcs. He was General Manager for South East Cumbria & Morecambe Bay for the National Trust in England, responsible for a number of visitor attractions including Sizergh Castle and Fell Foot Park.



**MARTIN GILBERT**  
**UNIVERSITY OF ABERDEEN**  
**SENIOR GOVERNOR**

In early 2017, the University of Aberdeen announced the appointment of Martin Gilbert as Senior Governor to lead its governing body, the University Court. Martin is a graduate of the University of Aberdeen and has become one of the UK's most prominent business leaders. He co-founded Aberdeen Asset Management and is joint CEO of Standard Life Aberdeen PLC. He has established a successful non-executive career within the public and private sectors.

**CAPITAL VIEWS: TEAM INSIGHT**

# MARY FEW

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Take a closer glimpse into the Saxton Bampfylde team based in Scotland with our *Capital Views* feature. The company's Scottish office is based in the heart of Edinburgh's West End in Melville Street.



**MARY FEW** is an Associate Consultant based in the Scotland office of Saxton Bampfylde.

#### PAST, PRESENT AND FUTURE

As an Associate Consultant in the Scotland office, I work with clients representing all of Scotland's industries from financial services, arts & culture, luxury manufacturing to education. The variety is what makes this role so exciting.

#### RAINY DAY DREAMS

I have just returned from New York where it cheerfully poured with rain whilst we were exploring Central Park; a hop and skip to the Met and we were lost for hours in awe of the collections there. I particularly loved the ancient Greek and Roman jewellery as well as the collection of 19th-20th Century European paintings which I have only ever dreamt about seeing in real life.

#### TRUE PASSION

With a toddler in tow, my true passion of travelling to far-flung places across the world has slightly been put on hold, but I hope to one day take him to visit exciting and unusual places far from the madding crowd.

#### ONE HOT TIP

Just outside Edinburgh's city bypass lies Jupiter Artland, an extraordinary, privately owned house and grounds which exhibits works by some of the UK's most famous contemporary sculptors, including the beautiful Landforms by Charles Jencks. There is also a very good restaurant in a gorgeous setting with excellent home baking.

#### SUM UP YOUR PRACTICE GROUP AREA IN THREE WORDS

Entrepreneurial, challenging and inspiring.

#### WHICH SECTORS OR GEOGRAPHIC REGIONS IN SCOTLAND DO YOU BELIEVE ARE THRIVING AT THE MOMENT?

Scotland has seen its fair share of economic challenges recently, however one area that we are excited about is the luxury manufacturing and retail sector. Scotland is the home of world-class whisky, hand-made Harris Tweed and cashmere, and there has been a resurgence in preserving the heritage and quality of these products as well as looking to grow on a global scale.

#### GET IN TOUCH WITH MARY

✉ [mary.few@saxbam.com](mailto:mary.few@saxbam.com)

☎ +44 (0)131 603 5702

## CONTACT US

#### EDINBURGH

46 Melville Street  
Edinburgh  
EH3 7HF  
+44 (0)131 603 5700

#### LONDON

9 Savoy Street  
London  
WC2E 7EG  
+44 (0)20 7227 0800

[www.saxbam.com](http://www.saxbam.com)

#### GLOBAL

Saxton Bampfylde is a member of Panorama - a global partnership of 16 leading independent executive firms around the world.

Australia. Brazil. Canada. China. Germany. India. New Zealand. South Africa. United Kingdom. USA

[www.panoramasearch.com](http://www.panoramasearch.com)



#### SAXTON BAMPFYLDE MISSION STATEMENT

We exist to change the world by changing leaders in interesting and important organisations. At the same time we aim to create an environment wherein all members of our community can grow to their fullest extent emotionally, intellectually and spiritually.

*Saxton Bampfylde is an employee-owned business*