



**Malvern Hills Trust**

# **Malvern Hills Trust: Business Plan 2016-2021**

**Reviewed with updates August 2019 to 2023**

Reviewed 2019

**Adopted by the Board at the meeting of 19<sup>th</sup> January 2017**

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# Malvern Hills Trust: Business Plan – 2016 To 2021

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Reviewed 2019

## Summary

The Malvern Hills Trust were established by Act of Parliament over 130 years ago, to protect and manage the Malvern Hills and the adjacent commons. The organisation is also a registered charity. It works to ensure the Hills are open for the public, whilst protecting the landscape and ecology of this iconic landscape.

This plan lays out the principle objectives of the organisation for the coming 5 year period and beyond. It recognises the current strengths and weaknesses of the organisation, as well as the opportunities and threats it is anticipated MHT will face over that same period. The result is a five year programme of works which is laid out in order to maintain the core work areas, while addressing those challenges that have been identified.

The key issues that MHT faces in the period of the plan are as follows:

- There are increasing demands on, and threats to, our financial resources. They come from a number of causes
  - the need to balance our income and expenditure in the face of increasing costs
  - the need to manage the pension deficit
  - the unknown consequences of leaving the European Union and
  - future reductions of grant income from agri-environment schemes.
- There are a number of key projects and tasks that need to be implemented over the life of this plan that are additional to the ongoing day to day management of the land under our care. These will require additional resources in terms of staff time, equipment or funding.
- The new Land Management Plan (2016-21) sets out a clearly defined and highly detailed programme of management principles and objectives for all the Hills. This includes the very large commitment the organisation has to ongoing maintenance requirements for habitat management and access provisions, as well as new initiatives and projects. Much of the land is scheduled (such as Sites of Special Scientific Interest (SSSI) or as Ancient Monuments) by external organisations so there is an ongoing obligation to maintain these areas to an appropriate standard. MHT therefore needs to ensure that the work programme is adequately resourced and supported if it is to deliver all that is planned and expected.
- MHT is currently heavily dependent on Higher Level Stewardship (“HLS”) grants for much of its habitat management work – especially the grazing management and scrub control. With the result of the EU referendum now throwing doubt on the future of these schemes we need to work to secure entry into any successor schemes, whilst also making contingency plans to guard against its loss.

- There is a limited awareness amongst the wider public that MHT is a charity. This is reflected in the low level of benefits (particularly in respect of donations/legacies etc.) that the organisation receives. We need to achieve a greater level of public awareness of who and what MHT is, with a stronger identity and wider recognition of the work that is undertaken by the charity.
- Work already undertaken has identified the need to modernise the governance of the organisation. As a statutory body the necessary changes can only be made by amending the governing Acts of Parliament. Consequently, the Charity Commission were approached, and have agreed to work with MHT to put a scheme before parliament to make the necessary changes. This is a significant step forward for the organisation but will require concerted effort if it is to be realised.
- Better contingency planning is needed to ensure that the work of the organisation can continue effectively in the event of a serious incident (e.g. fire, flood) occurring.

As a result, the focus of the work of the organisation over the coming 5 years will be to address all the issues that have been identified, with particular emphasis on the following areas;

1. Maintaining careful control of costs, while increasing income to the organisation and in particular diversifying income streams. This will include greater emphasis on sourcing and obtaining grants, as well as raising funds via appeals, donations and legacies.
2. Increasing awareness of MHT's charitable status and of the breadth, nature and value of the work undertaken, which is clearly linked to the need to diversify and improve income. This will include updating the MHT 'brand', adopting a public-friendly trading name, and optimisation of all avenues of communications (printed media, electronic media, on site, face to face).
3. Effective implementation of the wider Interpretation Strategy, including an update of the full suite of digital media, on-site signage and boards, public information leaflets and interpretation material.
4. Effective implementation of the new Land Management Plan (2016-2021) and its programme of work for the management of the Hills for the next five years.
5. Effective planning and delivery of the resources (financial, physical and human) needed to implement all the objectives of this plan.

6. Completing the next steps of the governance review, with a view to working with the Charity Commission to put a scheme before Parliament to amend and update MHT's governing documents.
7. Developing Business Continuity and Emergency Response Plans to ensure that the organisation is able to continue to function in the event of a major incident.

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# Introduction

## About the Malvern Hills Trust

The Malvern Hills Trust (MHT) were established under the Malvern Hills Act 1884 to protect the rights of Commoners and the public and to prevent encroachment on the Malvern Hills and Commons. Under this and the four subsequent Malvern Hills Acts (1909, 1924, 1930 and 1995) together with other relevant legislation, the Trust have a duty to:

- Preserve the natural aspect of the hills
- Protect and manage trees, shrubs, turf and other vegetation
- Prevent unlawful digging and quarrying
- Keep the hills open, unenclosed and unbuilt on as open spaces for the recreation and enjoyment of the public
- Conserve and enhance biodiversity, Sites of Special Scientific Interest and Scheduled Ancient Monuments on its land.

The Trust are also a registered charity (charity number 515804).

Land was first put under MHT's direct jurisdiction by the 1884 and 1924 Acts. In addition MHT was given the power within the Acts to acquire other land within a 9 mile radius of Gt Malvern Priory. For convenience this plan refers to all land including the hills, commons and verges under MHT's jurisdiction or ownership as "the Hills".

Approximately 1,200 hectares (3,000 acres) of the Hills and Commons now fall under MHT's jurisdiction and we strive to manage this land for the benefit of wildlife, the commoners, the local community and the hundreds of thousands of people who visit the Hills each year.

There are a diverse range of users of the Hills and Commons and these include graziers, walkers, dog walkers, horse riders, mountain bikers and hang gliders. One of the major challenges is to meet and balance the needs of these different groups – whilst preserving the landscape and wildlife of this nationally important area.

### Our Vision

A beautiful, inspiring landscape, rich in heritage and wildlife – for the peaceful recreation of everyone.

### Our Mission

To restore, conserve and increase appreciation of the landscape, wildlife and cultural heritage of the Hills and Commons, keeping them open and accessible to the public for peaceful recreation, relaxation and enjoyment.

## Our Values/Guiding Principles

- **Positive** – in our approach to the difficult issues and challenges which we will inevitably face in our work and in our internal and external communication.
- **Passionate and enthusiastic** – about the Hills, their wildlife, recreation and about our work.
- **Open, transparent and accountable for our work** – to be responsive to the needs of the public, partners and each other and going the extra step to engage people in, and explain, our work.
- **Friendly, approachable and respectful** – in the way we deal day to day with colleagues, the public and contractors as well as other public bodies and charities.
- **Innovative** – constantly seeking to expand our knowledge and skills and use these to identify new ways of working which will improve the effectiveness of the organisation.
- **Inclusive** – ensuring that the Hills and Commons, the services we provide and the information that we produce are accessible to as many people as possible.
- **Robust** – in our protection of the Hills, upholding the Malvern Hills Acts and the principles which underlie them as well as in our management of the organisation.
- **Sustainable** – in relation to our environmental performance and to the management of our finances and other resources.

## The Board and its Committees

The organisation is overseen by the Board of Trust. Their role is to set the strategic direction of the charity, agree overriding policies and ensure that the organisation complies with the Malvern Hills Acts and remains true to the guiding principles which underlie the Acts. As a charity, the Board is responsible for ensuring that the organisation achieves its vision, without straying from its mission, whilst remaining true to its values.

The Board is made up of 29 members; 11 Board members are directly elected by residents within Chase, Dyson Perrins, Malvern Link, Pickersleigh, Priory, Wells and West wards and the parishes of Colwall, Guarlford and Mathon. The remaining 18 are nominated by Malvern Hills District Council, Worcestershire County Council, Herefordshire Council and the Church Commissioners.

The business of the Board is conducted through the following main committees:

- Finance, Administration and Resources Committee – make recommendations for financial management and legal matters.
- Governance Committee – oversees compliance with charity law, governing documents etc. and reviews the effectiveness of the Board and its committees.

- Land Management Committee – oversees the management of the Trust land holding, makes recommendations regarding easements, changes to land management policy etc.
- Staffing Committee – make recommendations in relation to human resources and health and safety matters.
- Disciplinary Committee – meets only when required to address matters in relation to code of conduct.

In addition to the main committees there are two standing consultation committees, the Wildlife Panel and the Recreational Advisory Panel, which engage with the many active stakeholder groups and provide valuable input to the ongoing management of the Hills. From time to time additional working groups are formed to look at specific topics of concern to the Board.

## **Operational Management**

The day-to-day work of the organisation, and implementation of the Board's strategic aims, is undertaken by the CEO and a team of paid staff. These staff cover a range of different functions within the five main areas of wardening, field work, conservation, finance and administration.

In addition to the staff, the organisation currently receives support from approximately 50 regular volunteers. These volunteers currently act principally in the roles of administration, practical field work and surveying.

The current organisational structure is shown as Appendix 1

## About the Business Plan

In its simplest form, this Business Plan aims to do three things:

- Identify the key **targets** and **issues** (known or anticipated) that the organisation faces over the coming 5 years.
- Set out how MHT intends to grow and develop to meet those issues.
- Identify what resources are needed to achieve and maintain the **core objectives**.

It will help to ensure that the organisation is able to:

- take a strategic approach to its work – ensuring that resources are focused on activities which will help us to deliver our vision.
- foresee problems and be proactive in taking actions to address them.
- maintain an economically sustainable structure that delivers its objectives on target.

The Business Plan is separate from but complementary to the Land Management Plan 2016-2021. Whereas the Land Management Plan sets out the practical methods to conserve, maintain and enhance the Hills and Commons over the next 5 years, the Business Plan focuses on the management of the organisation itself, its financial and physical resources, and the way in which the organisation intends to grow and change to meet the perceived needs of the future. It addresses Land Management issues only where these are important for strategic or governance reasons.

The plan has been developed in consultation with the Board of Trust, the staff of the Malvern Hills Trust and with the organisation's partners. For a list of those involved please see Appendix 3

This plan must be seen in the context of the Malvern Hills Acts: The Trust activities and operations, as a statutory body are directed and limited by the duties and powers set out in these Acts.

**Part A:**  
**Identifying the Key Issues**

Reviewed 2019

## The Current Situation

MHT has been in existence for 132 years, (longer than the National Trust) and throughout that period its primary role has been the protection and preservation of the Malvern Hills. It is as a result of this continuity of effort that the Malvern Hills exist today as an unspoilt and protected landscape area with a strong national identity.

Over that period the area of land MHT manages and cares for has steadily grown, from 1608 acres in 1931 to over 3000 acres today. As the area of land has increased, and social uses have changed, so the range of management and maintenance responsibilities that are required has similarly expanded. In response, the organisation has had to grow and develop to its current size and structure to deal with the demands of our society's ever-changing use of and demands on the hills.

Future development and change is inevitable and the organisation therefore cannot remain static - MHT needs to grow in a sustainable and planned way in order to meet the needs of the next 5 years and beyond.

## Malvern Hills Trust: SWOT Analysis

As a first stage in the development of this plan, an internal SWOT analysis of MHT was carried out in April of 2015. That analysis took an objective look at the current strengths and weaknesses of the organisation, and the opportunities and threats that were apparent at that time. The results of that analysis may be found in Appendix 1.

Since then the results of that analysis have since been overtaken by a number of events – such as the completion of the Land Management Plan, the internal review of Governance (and the decisions taken as a result of that) and, most significantly, the results of the UK referendum on EU membership.

This last event has major implications for the organisation and highlights two major points;

- The first is that no SWOT analysis, strategic plan or forward projection can consider every single factor that might have an impact on future work.
- Secondly it underlines the need for the organisation to retain a degree of flexibility in its approach. We can schedule works, prepare resources and seek grants and funds for the works planned, but there is also a need to regularly revisit and appraise those plans to ensure they are still appropriate in light of changing circumstances.

## Outcomes from The SWOT Analysis

The following list highlights a number of the **issues** (in no particular order) that were identified in the original SWOT analysis and from a subsequent assessment of MHT's position following recent events.

- A need to develop, monitor and review a strategic plan for the organisation which encompasses, amongst other things, the action points listed here.
- Ensure that MHT maintains a skilled and motivated staff team through a supportive and constructive Board, effective line management, a good working environment, appropriate salaries and conditions reviewed on a regular basis and excellent development opportunities.
- Expand the capacity to manage and develop volunteers – in order to increase the number and range of roles and tasks volunteers undertake within the organisation.
- Work with the Charity Commission to clarify, update and amend the Acts of Parliament.
- Maintain the value of car parking income through ongoing reviews of the fees.
- Refurbish our buildings and develop and introduce a programme of planned preventative maintenance in order to ensure MHT's properties remain in good condition.
- Maintain the strong links that we have developed with government agencies such as Natural England and the Forestry Commission.
- Ensure that effective use is made of the available capital funds. Where these are not required for projects in the foreseeable future, the funds should be invested to maintain and, wherever possible, increase their value.
- Implement plans for a clear new brand and identity for the organisation.
- Create a plan to improve the environmental performance of the organisation.
- Produce 5 year budgets which take into account foreseeable changes in both income and expenditure.
- Clarify the boundaries of all of MHT's land to enable us to ensure greater protection against encroachments, better manage easement applications, etc.
- Complete the archiving project and ensure that records are retained and filed systematically in the future.
- Seek to make increased use of grant and fundraising opportunities to fund both our existing work and new projects.
- Review how we deal with breaches of the Malvern Hills Byelaws/byelaw enforcement.
- Monitor opportunities to relocate the offices, to include greater office and meeting room space and better visitor interpretation facilities, which will give MHT a stronger presence on the Hills.
- Continue to monitor planning applications to ensure that development does not adversely impact MHT's land.
- Continue to ensure that easements across MHT land are used appropriately and, where required, applications for access are received and properly considered.

- Work to develop partnerships with appropriate organisations in order to enhance our ability to achieve our mission.
- Continue to develop the events programme and consider how this can be used to both aid fundraising and increase public understanding of the special character of the Hills.
- Review the management of site infrastructure (paths, car parks, benches, etc.) and the likely impact that required maintenance will have on staff requirements and budgets.
- Define a clear policy for dealing with the pension deficit.
- Monitor the development and implementation of the new Countryside Stewardship Scheme and ensure that MHT is in a position to submit applications at the earliest available opportunity.
- Develop appropriate campaigns to ensure that the conflicts between conservation and increasing use of the Hills for recreation are minimised.
- Ensure that resilience against climate change is built into the both the Business and Land Management plans.
- Develop a business continuity plan in order to ensure that, in the event of major incidents such as fire or flooding, MHT can continue to operate.
- Investigate and consider how the organisation can adopt new technology in order to increase efficiency and effectiveness.
- Continue to pay particular care to the health and safety of our staff, volunteers, contractors and visitors to our property.

**These and other challenges we face can be summarised under the following four headings:**

*Our ultimate duty and responsibility is the conservation and **management of the landscape** of the Hills and Commons;*

*To achieve that we need adequate **sustainable resources**;*

*To enable much of our work to be effective we need good **communications** with the public and stakeholders;*

and lastly;

*To ensure it keeps on track, we need the right level of organisation, **governance** and controls.*

Using these headings to group the challenges, Part B of the plan looks in further detail at the challenges facing the Trust and the actions required over the next 5 years to address them.

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**Part B:**

**Delivering Our Core Aims and Objectives**

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# 1. Land Management

## 1.1 Habitats and Landscape

The full range and scope of land management work for the future 5 year period is contained in the Land Management Plan (LMP), approved in 2016. This document clearly lays out the detailed management of the whole of our 1200 hectare estate on a site by site basis. It takes into account the various needs, priorities and challenges that each part of our land holding faces and sets out a programme of works to maintain and improve the combination of archaeological and heritage aspects, habitat management and access facilities.

The full details of the LMP include all the regular annual maintenance works MHT undertakes, such as grass cutting, scrub control, tree management and path maintenance. Put together these maintenance works take up a significant proportion of our staff and machinery resources each year.

Beyond the day-to-day business of this essential maintenance work, there are however additional key targets and projects ('special work items') that the Land Management aims to address over the coming 5 year period. These are highlighted as follows:

### 1.1.1 Maintaining the current version of the LMP

The plan was agreed by Board in 2016 and is now in operation but will require regular annual reviews to monitor its implementation and to make amendments to take into account any changing circumstances.

Updated August 2019

The plan agreed by Board in 2017 is in operation and was given its first partial annual review in early 2018 and this second full review in June 2019. Relevant amendments and additions are now carried through into this Business Plan Review.

### 1.1.2 Securing the future of grazing across the Hills and Castlemorton Common

In recent years we have been able to restore grazing to the Hills and slow the decline in the level of livestock grazing by local commoners on Castlemorton and Holybed commons. This is critically important as without effective levels of grazing being undertaken the work of habitat management achieved by graziers will pass to MHT, with consequential increases in demands on our limited financial and human resources.

Research carried out in 2015/16 identified a number of barriers to commoners in turning their livestock out on some parts of MHT land, and we need to implement works that will better facilitate such grazing. Securing the perimeter of

Castlemorton Common is a strategically important option as it would make stock grazing more easily managed, reduce time spent by graziers in retrieving wandering animals and reduce the risks of stock loss through road accidents. If this can be achieved it is anticipated that more commoners would turn out their own animals onto the common.

The next stages are to work up the fine detail of a suitable scheme, in partnership with the many stakeholders and authorising bodies, before carrying out public consultation on preferred options. Only then should MHT seek consent through the respective government bodies for the works. It is anticipated that major infrastructure works may be needed, requiring significant funding costs that will need to be grant sourced before the project can be undertaken.

Updated August 2019

This important piece of work based on research carried out in 2015/16, proposed to implement works that will better facilitate grazing across Castlemorton Common. Its implementation is however dependant on MHT obtaining wider powers to fence, as part of the Charity Commission Scheme, and securing major funding through the Lottery.

Initial works in the form of outline application to HLF and initial consultation with commoners and landowners around the common have been undertaken, but the project has had to be set back in the programme, pending the outcome of the Charity Commission Scheme and new HLF funding programmes.

### 1.1.3 Hill Grazing

We need to further secure hill grazing in other areas, in particular over Ragged Stone Hill, through the extension of perimeter security so that more sustainable grazing management can be undertaken.

Updated August 2019

Extension of perimeter security to some of the hills is suspended pending implementation of the Securing the Commons Project. After initial investigations it was determined that adding water supplies was not currently required so this project element has been deleted.

### 1.1.4 Thirds Wood Management

There is a need to develop and implement a programme for dealing with current and future safety and silviculture issues at Thirds Wood. Inspections have identified a raised level of risk associated with the high proportion of larch trees reaching maturity and their density on the steep slopes. The level of risk is only likely to increase as these trees become 'over-mature'. With professional advice, MHT has undertaken initial planning and consultation on the proposed works and a phased felling programme is to be finalised and implemented during the life of this Business Plan. This will take several seasons to implement and given the public affection for this area of woodland, known locally as 'Little Switzerland', regular and consistent public relations will need to be maintained and managed.

### 1.1.5 Preservation of Archaeological features

Archaeology is an important feature of the Hills and Commons and its preservation is a key element of the management of the properties. British Camp and the Shire Ditch, both important scheduled monuments, are in need of additional restorative works to reduce the impact of erosion by recreational users, limit the extent of rabbit damage, and control invasive scrub vegetation. A programme of works needs to be implemented over the full period of this plan to address these issues and maintain these important features in good condition.

Updated August 2019

The programme of works to address erosion and damage at British Camp and Shire Ditch were to be implemented over the full period of this plan. Due to delays with specifications these works have been delayed in 2018 but have been part completed in 2019/20. Assessment of the success of the method of repair is required before further works are undertaken.

#### ***NEW Element – British Camp Pathway***

Recent condition assessments of the main footpath to the British Camp summit has highlighted that it is in declining condition. Short term repairs will be needed, with longer term resurfacing of the whole path anticipated in the next 4 – 5 years. Specification and quotes to be obtained.

### 1.1.6 Fencing

Fencing around dangerous features, in particular quarries on our land, needs to be maintained to a high standard. The fencing to Gullet Quarry in particular needs to be upgraded to ensure public risk is minimised and unauthorised access to the site can be properly enforced against.

Updated August 2019

Repairs and upgrades to quarry fencing have been implemented as planned to date, and ongoing repairs and improvements will need to be maintained. Assessment of the need for additional fencing requirements for smaller quarries has been added in during 2019/20 with additional works anticipated now for the following 4 year period. RoSPA to be asked to undertake reassessment of safety measures installed to date at Gullet Quarry.

### 1.1.7 Tree and Hedge Management

A pro-active approach to the maintenance and restoration of open habitats under our care is to be implemented. In particular the reversal of scrub encroachment onto the middle and upper slopes of the Hills is planned as a priority that delivers our duties towards the SSSI and AONB designations and is a major work commitment for the next 5 winter seasons. Integral to that clearance will be ongoing control of subsequent regrowth in order to maintain the restored open habitats.

Updated August 2019

Annual tree and hedge management has been undertaken in line with the 5 year management plan using combination of contractors, field staff and volunteers, with successful completion of target areas in the first 2 years of the programme. This to be rolled forward to 2023/24.

Tree safety assessment procedures is being updated in 2019 and this will require additional staff time from winter 2019 onwards.

### 1.1.8 Water Bodies

Water bodies are an important ecological and historical element of the landscape that we manage yet require management in order to be kept in satisfactory condition. Works need to be undertaken to restore ponds on Guarlford Road and lower Malvern Common, as well as other ponds elsewhere, to clear invasive and non-native aquatic weeds from these sites while retaining protected and scarce species.

Updated August 2019

Restoration of water bodies has progressed in first two years as per the plan. More works need to be undertaken to restore more of the ponds scattered around MHT land. Additional funding needs are projected to be required every other year.

### 1.1.9 Extreme Weather Plan

During winter 2013, when there were periods of heavy snow, there was uncertainty regarding the method and extent of treatment of the car parks. There are also issues that may arise relating to use of the Hills during other extreme weather events e.g. gales or drought. MHT needs to develop an 'Extreme Weather Plan', laying out contingency arrangements and procedures during such periods, including a strategy for communication with the public in the event of closure or restriction of access to parts of the Hills.

Updated August 2019

The Extreme Weather plan was reviewed and updated in 2017 to allow for severe winter weather, including policies on snow clearance, car park closures and public information. These worked satisfactorily in the winter of 2017/8 but plan needs to be expanded in 2019/20 to include flooding and other severe weather patterns, in particular drought.

### 1.1.10 Surveys

In order to measure the effectiveness of the habitat management works that MHT undertakes and to further identify any species or habitats of note that require particular management measures, it is important that MHT undertakes both regular monitoring and more specialised surveys during the life of the Business and Land Management Plans.

Updated August 2019

Several surveys were undertaken in 2017 and 2018 in particular to supplement data records for the production of the Wildlife of the Malverns Book, and the veteran tree survey. More detailed systematic surveys need to be implemented in coming years – particularly with regards to tree diseases.

## Land Management -What do we aim to have achieved by 2021?

Required Actions	Targets for 2021
Monitor and review the 5 year plan on annual basis, and roll forward.	The first 5 years operations have been fully implemented in a timely manner and a plan for the next 5 year period is ready for implementation.
Increase security for the future of grazing on the Hills and Commons by <ul style="list-style-type: none"> <li>- Implementing a 'Securing Castlemorton Common' project</li> <li>- Securing future successor schemes to the HLS scheme for all current areas</li> <li>- Maintain grazing levels through new agreements with graziers.</li> </ul>	We have improved grazing infrastructure and levels of grazing over all Hills and Commons, with <ul style="list-style-type: none"> <li>- an increase in the number of graziers and/or the number of animals</li> <li>- conditions at Castlemorton Common improved to allow better grazing.</li> <li>- Adequate levels of grant funding for grazing programmes secured</li> <li>- We have secure agreements through tenancies, FBT etc. covering all appropriate land areas.</li> </ul>
Increase facilities including fencing and water provision on the Hills to enable more effective Hill grazing.	Fencing and water supplies have been improved over the hills, thereby allowing more effective grazing management.
Undertake forestry operations in Thirds Wood	Thirds Wood thinning and safety works have been effectively completed; the wood in a good state as a well-spaced mixed woodland. A future maintenance plan for the wood has been laid down
Undertake works to preserve and restore the archaeological features of British Camp and Shire Ditch	The worst areas of erosion damage to British Camp and Shire Ditch have been repaired, measures taken to reduce future damage from erosion and rabbits, and priority pathways in these areas have been improved.
Obtain appropriate specification and costings for major replacement of British Camp pathway	Specification and costings are understood to enable further planning of resource allocation and to obtain grants.
Improve and maintain safety fencing around all dangerous sites, in particular Gullet Quarry.	Fencing around all dangerous quarries is in good condition, well maintained and regularly inspected.
Implement tree and hedgerow management aims by	The long term aims of the LMP for the tree line on the hills to be lowered has been progressed.

<ul style="list-style-type: none"> <li>- Undertaking an annual programme of scrub woodland management</li> <li>- Continuing support of coppice management project in Park Wood</li> <li>- Undertake hedge laying programme</li> </ul>	<p>Park wood is in an effective coppice cycle.</p> <p>Programmed areas of hedge laying have been completed.</p>
<p>Water bodies are restored and cleared of invasive weed species</p>	<p>Malvern Common / Guarlford Road ponds have been restored and invasive non-natives cleared from others.</p>
<p>Extreme Weather plan to be compiled</p>	<p>We have contingency arrangements in place to deal with any severe adverse weather event.</p>
<p>Undertake surveys of habitats and species</p>	<p>Surveys of key species and habitats have been undertaken.</p>

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## 1.2 Access and Recreation

MHT has a duty to keep the Hills open for public recreation but there is no duty under the Acts to provide wider facilities and there are limited powers to make improvements for access other than to install surfaced paths, seats, toilets and car parks.

However, there is strong desire to ensure that as many people as possible can experience and enjoy the Hills and Commons – whilst ensuring that;

- (a) the natural environment which makes it such a special place remains unaffected  
and
- (b) the safety of those using the Hills is maintained as far as reasonably possible.

Over the next five years MHT plans to undertake a range of works and improvements to the access facilities as follows:

Updated August 2019

Primary objectives for this area of work remain as in the current Business Plan – making provisions so that as many people as possible can experience and enjoy the Hills and Commons – whilst at the same time ensuring that;

- (a) the natural environment which makes it such a special place remains unaffected  
and
- (b) the safety of those using the Hills is maintained as far as reasonably possible.

In the first 24 months of the plan a great number of the works have been started, with some completed, but many requiring more sustained input than originally planned.

### 1.2.1 Car Parking

Car parks serve a number of functions. Firstly, for the majority of people, they are the first point of access for the public visiting the hills, and are a major point of contact between our organisation and the public. Indeed, for most visitors who come to walk the hills from outside the local area, these are the only places where they have any real interaction with MHT or get the chance to see who and what the Trust are. Secondly, the car parks provide a critical traffic management function for the Hills and Commons. Parking and driving on the common is prohibited under byelaws, yet there is tremendous pressure from people accessing the Hills to do so by car. By maintaining the current car parks, we enable visitors arriving by car to access the hills, and in turn limit and control unauthorised parking. Even so, during busy periods such as Bank Holidays, our current car park provision is insufficient, resulting in high numbers of vehicles parking unlawfully on verges and open grass areas. Thirdly, the car parks are an important generator of revenue for the organisation. This income is important as it not only helps cover the maintenance costs of the car parks themselves, but also provides direct support to the wider costs of maintaining the Hills (See Finance section). In this way

visitors to the hills are directly contributing to the maintenance of the landscape they have come to visit.

MHT has a responsibility to maintain the condition and standard of the car parks in order to ensure that they are safe and fit for use and present a positive image to visitors. To deliver this, over the next 5 years we aim to draw up and implement a programme of scheduled maintenance works for the surfacing and markings of the car parks, resurface two of the smaller car parks and rationalise parking provision on lower Malvern Common. New car park meters will be needed in 2017 (see Finance and Funding) and following on from any rebranding there will be a programme to install new signage and interpretation boards. (see Communications - Signage)

Updated August 2019

A programme of car park repairs was drawn up in early 2017 and work undertaken on a number of the car parks over the first two summers with Beacon Road, West of England, Link Common (lower), British Camp, Upper Gardiners and Black Hill all received minor patching works. Further repairs to other car parks have been identified and the cold winter of 2017/18 with heavy snow and ice have caused increased numbers of pot holes and broken edging to some car parks. Consequently, Old Hills car park repairs were carried out earlier than planned. Lower Gardiners ramp was resurfaced in spring 2019.

Additional work and resources are now identified as being needed through to 2023 as follows:

Earnslaw – Upper section: maintenance surfacing and grading needed.

Boundary marking and bay delineation required.

Lower Section: maintenance surfacing and grading needed.

Gardiners – Upper: maintenance surfacing and grading needed

Middle: maintenance surfacing and grading needed

Lower: ramp repaired 2019.

Black Hill – Capacity inadequate for busy days – especially Bank Holidays.

Capacity to possibly be increased by

1 - expanding upper section and marking to allow central line of 10-12 bays

2 - widening on northern access ramp to allow row of oblique bays (15-20 bay)

British Camp – rationalisation of disabled bays and motorcycle parking required.

Beacon Road – Lower: Maintenance surfacing and grading

Upper: Edging of tarmac to be repaired / replaced.

North – Drainage improvements and speed ramp upgrade to access required  
maintenance surfacing and grading needed.

Tank - maintenance surfacing and grading needed.

West of England - Northern access ramp: shoulders to be resurfaced.  
maintenance surfacing and grading needed.

Repainting of British Camp, Manor House and Beacon Road car park bays was carried out in 2017. Further line painting is set back to fit in with repair works due.

New car park meters are being installed in 2019 with card payment facility (see Finance and Funding) and following the rebranding a programme to install new signage and interpretation boards has been part completed (see Communications - Signage).

### 1.2.2 Path Maintenance

There is a feeling amongst some that, in the drive to reverse the loss of important habitat on the Hills, the maintenance of paths has suffered neglect. Well-surfaced paths will go a long way towards enabling people with restricted mobility to access the Hills, as well as drawing pedestrian traffic in busy areas onto routes that can withstand the footfall, and thereby reduce pressure on more sensitive habitat areas. MHT needs to identify priority routes for repair and implement a programme of path restoration and repair, based on

- (a) the current level of disrepair
- (b) the current and future anticipated level of use
- (c) the likelihood of the path being accessible to people with mobility problems.

The restoration programme will include investigating and drawing up a specification for durable path surfacing and identifying an effective means of draining surface water from paths in order to minimise future erosion. A comprehensive inspection and maintenance programme will then need to be implemented.

Updated August 2019

The path network condition assessment was carried out in 2017. Improvements to heavily used path sections have been undertaken, with the northern and eastern section of Lady De Walden Drive benefiting from extensive grading and surfacing work. In addition, there have been a number of smaller path sections that have been regraded.

The Easy Access Trail at Earnslaw and the trail from British Camp were resurfaced in 2017/18.

### 1.2.3 Improving Access

In addition to the maintenance and upgrade of the existing path network, there is a need to improve other access facilities. The main pathway through the Community Woodland area at Townsend Way? is in need of surfacing to provide better access to a wider range of visitors. Similarly, some sections of suburban bridleway are experiencing erosion and wear that needs remedial action to stop them getting worse.

In addition to the maintenance and upgrade of the existing path network, it was identified that there was a need to improve access elsewhere.

Funding of over £40,000 has been secured for the Community Woodland at Townsend Way, with tenders currently under consideration and works expected to be undertaken in early autumn 2019. Further small sections of connecting pathways have been identified that should be upgraded to provide an improved network of paths.

Repairs to drainage at St Ann's were completed in early 2018 having been set back pending completion of the main refurbishment works at the Well.

#### ***NEW Element - Beacon Track Surfacing***

The main tarmac track / path up to the Beacon is in need of repair due to continued use and erosion. Currently, an estimated 100m<sup>2</sup> of surface needs to be repaired. This work could be spread over several years, but it would be more cost effective to undertake it in a single period of work.

### **1.2.4 Cycle Access**

Recent years have seen increasing use of the Hills and Commons from mountain bikes. This social change in the way the land is being used can cause issues of conflict with other user groups, impacts on the landscape through erosion of the turf and habitats, and conflicts with the byelaws. There is a recognised need to run a campaign to encourage safe and responsible cycling on MHT land (See Section 3.2 below), and this is already underway. As part of the package of measures required in managing the mountain bike issues, MHT will need to consider way-marking footpaths, bridleways and permissive cycle routes 'on the ground' in order to clarify to all users where cycling is permitted.

Updated August 2019

Way-marking of footpaths, bridleways and permissive tracks for three official cycle routes was completed in 2019. These have been provided to make it clear to all users where cycling is permitted. No further major costs planned but some further cycle specific signage may be required to supplement these three routes in the coming years.

### **1.2.5 Dogs**

Similarly, it is anticipated that MHT will need to develop and run a campaign aimed at resolving some of the problems relating to dog walking on the Hills (See 3.2). These include dog fouling, livestock worrying and disturbance of wildlife. Possible solutions may include, for example,

- installation of new signs,
- reviewing provision of dog bins,

- establishing dog free areas for the benefit of wildlife;
- altering access provision through stock fencing

Updated August 2019

The dog campaign originally planned to run early 2019 was postponed for 6 months to allow for the completion of the cycling campaign.

### 1.2.6 Visitor Surveys

In order to effectively manage needs of the visiting public and their impacts on the landscape, both now and in the future, we need more fully to understand the ways in which users are accessing the hills. A visitor survey is required that can provide information on the types and source of visitors, their needs and the recreational activities they undertake while here, as well as their geographical and temporal spread, among many other factors. Changing trends in recreational use need to be properly understood so that we can amend habitat and access management plans to minimise any adverse impacts. A visitor survey will also provide evidence to support future grant applications and fundraising appeals for access related projects.

Updated August 2019

A visitor survey was undertaken in 2018 in partnership with the AONB. The survey provided results from over 400 interviewees, indicating where they had come from, methods of transport, use of and time spent on the hills, as well as many other elements. To supplement this survey and provide accurate quantitative data on users at different of locations, a number of people-counters are planned to be installed at key bottleneck points on the hills.

## Access - What do we want to have achieved by 2020?

Required Actions	Targets For 2021
Undertake repair and maintenance to car park surfaces, resurface as required and update / refresh line painting and signage.	All car parks are in good physical repair, have clear markings and good signage so that visitors in vehicles and on foot have clear direction.
Identify and prioritise pathways that need restoration and repair and undertake a programme of works.	A programme of path restoration work has been completed for those routes identified as priorities.
Upgrade and improve surfaces in high traffic areas	The main paths, such as that through the Community Woodland, is of standard to withstand traffic levels and bridleway surfaces have been improved.
Undertake resurfacing to sections of Beacon track	Beacon track is in good condition and suitable for all users.
Undertake works to manage mountain bike access.	We have an effective network of cycle access and no-cycle routes that are clearly waymarked, with resultant reduction of conflict between users.
Undertake works to manage dog access issues.	There is a system of clear signage and information for dog walkers and a reduction in the number of reported incidents involving dogs, especially in regard to stock.
Undertake a visitor survey	MHT has a clear understanding of the numbers, locations and user types visiting our land.

## 2. Resources

### 2.1 Staff, Board Members and Volunteers

MHT's staff team are skilled, committed to the organisation and extremely motivated and we also have a number of dedicated Board Members and volunteers. There is a need to invest time, effort and resources in ensuring that this remains the case. We also need to ensure that staff roles and structure meet the changing and increasing demands on the organisation and allows MHT to effectively deliver its functions. A new Staffing Committee was established in 2016 to help address these and other staff-related issues.

Finally, given the popularity of the Hills, there is great untapped potential for us to attract larger numbers of volunteers to undertake a wider range of tasks on our behalf.

#### 2.1.1 Staff Structure

The Board agreed a new staff structure in 2014 – which involved changes to line management responsibilities, new posts and some previously full-time roles becoming part-time. It was felt the new structure would improve the efficiency and effectiveness of the staff team. Some of the changes agreed have been introduced, but some are outstanding, so the re-structure therefore needs to be completed, with the titles of some posts changed to provide consistency.

We also need to plan for changes within the staff team. Limited term contracts for some roles need to be reviewed and future staffing needs identified. There is also the possibility of changes, e.g. due to retirements, within the staff team during the period of this plan. We need to ensure that we plan for this and are able to minimise the impact of the lost knowledge and experience.

Updated August 2019

Some of the changes agreed have been introduced, but some are outstanding and further planning of staffing capacity and needs is required. Particular areas that need increased capacity are wardening, fundraising and estate management.

Changes have been made to some of the staffing arrangements with one temporary post being made permanent and another part time being upgraded to full time. Succession planning for future loss of staff through retirement has been initiated through the Staffing Committee in 2018 and further planning is underway.

#### 2.1.2 Fair and consistent employment policies.

In collaboration with our HR advisor a new staff handbook has been produced which contains a comprehensive set of policies. A number of the Trust's other HR policies are due for renewal and the handbook needs to be regularly reviewed and updated.

Updated August 2019

In collaboration with our HR advisor, the Trusts HR policies have been reviewed and a number updated, or new policies introduced. Policies on Bullying and Harassment, Safeguarding and GDPR compliance have been introduced. Staff handbook has been updated accordingly.

### **2.1.3 Continuing to invest in staff development.**

The employee appraisal system includes agreeing an annual training plan for each member of staff. The training budget for staff has been increased over the last 3 years in order to increase the level of training provided. However, this was starting from a very low base – and we need to continue to review this budget to ensure staff are able to continue to develop their knowledge and skills.

### **2.1.4 Undertake job evaluation and benchmarking.**

Currently salaries are linked to local authority pay scales. However, no recent job evaluation or benchmarking has been carried out. It is therefore not possible to demonstrate that the salaries reflect the level of responsibility or the knowledge and skills required to undertake the post.

Updated August 2019

The benchmarking exercise was carried out in 2018 using an external consultant with first results presented to the Staffing Committee.

### **2.1.5 Providing improved staff and volunteer welfare facilities.**

The Field Staff's operational base in the 'Top Shed' has new toilet, washing and kitchenette facilities being installed. Consideration needs to be given to providing proper facilities to support any future increase in volunteer numbers.

Updated August 2019

Welfare facilities were completed at the Top Shed in 2017.

### **2.1.6 Developing an apprenticeship scheme or similar.**

MHT receives regular requests to provide work experience, many of which are from young people who live locally and whose ambition is to work in the land-based industries – but who have little or no experience. There is an opportunity here for MHT to increase its staff resource, whilst at the same time giving young people from the local community a better understanding of the work and issues that relate to the Hills. There are other potential indirect benefits from such a scheme – particularly in building the public perceptions of the Trust and improving links to the local community.

However, space availability is currently a limiting factor for developing this area and adequate desk space needs to be found.

Updated August 2019

After initial works on this area in 2016/17 were undertaken, the project has been placed on hold pending availability of suitable scheme partners and having capacity within the organisation to accommodate them.

## 2.1.7 Developing volunteering within the charity.

Currently the organisation makes only limited use of volunteers compared to other conservation charities. While there is an existing group of long-standing dedicated volunteers who have been supporting the organisation for many years, the range and number of volunteering roles needs to be expanded if the organisation is to deliver on its long term aims.

MHT need to

- (a) Increase the range of volunteering opportunities within MHT
- (b) Increase the number and skill set of volunteers giving us their time and effort by improving the procedures for recruitment, induction and training
- (c) Ensure that we focus the efforts of volunteers on tasks which are essential to achieving the Trust' priority work.
- (d) Increase the retention level of existing volunteers by recognising their value to the organisation and supporting them through training and events

It should be recognised that volunteers are not a 'free resource'. Developing volunteering roles and maintaining those volunteers takes time, effort, and a financial commitment. To effectively implement an expanded volunteer role within the organisation, additional staff time dedicated to their recruitment, training, and coordination will be required.

Updated August 2019

Volunteer numbers and time contribution have increased over the first two years of the BP. In particular we have seen an increase in practical volunteers on work tasks, plus a significant increase in the number of volunteer Wardens, with both Site and Roaming wardens increased, and at least one new water-bailiff warden. Volunteer support in the offices and archiving area has also been maintained and consequently the Trust has benefitted with the progress of a number of project areas.

Further expansion is still required so coordination and management of these volunteers, currently undertaken by existing staff posts, will be an increasing requirement. Priority needs to be given to a volunteer coordinator role (itself a volunteer post).

## 2.1.8 Training and Personal Development

MHT needs to ensure that it keeps the skills and knowledge of our staff, board members and volunteers up to date. This includes all aspects of training - eg basic hand tool and machine use by volunteers, in-house first aid training, IT skills, familiarity with current charity law and the governance legislation that applies to our organisation etc. A full review of our training needs, provision and budget should be undertaken to ensure we are maintaining standards.

Updated August 2019

Training provision has seen some improvements in the first two year period, with many staff being given training targeted to their posts and duties as a result of their annual appraisals. More general training topics (eg First Aid and

Defibrillator training) have been undertaken with both staff and volunteers, and in-house training and briefings (eg for volunteer wardens, being developed.) Budgets for training are currently adequate for needs, but growth in volunteer numbers will require more capacity.

Reviewed 2019

## Staff & volunteers - What do we want to have achieved by 2021?

Required Actions	Target For 2021
Review and implement Staff Structure	The organisation has a staffing structure adequate to meet its needs, and continued high levels of staff retention.
Review staff policies against current legislation and best practice.	The staff handbook is provided to all staff and is up to date against current legislation
Undertake job evaluation and benchmarking	All staff have clear job descriptions and salaries have been benchmarked against comparable posts in other organisations.
Install and upgrade welfare facilities for field staff and volunteers	All staff and volunteers have access to adequate welfare facilities.
Develop and implement an Apprenticeship scheme	We have been able to provide apprentice spaces thereby providing additional staff capacity.
Develop the range and use of volunteers	We have good numbers of long-term volunteers – fully engaged with the Trust and helping us to carry out a wide range of roles within the organisation.
Undertake review of training needs / provision	Individual staff members and the organisation as a whole are benefitting from continuous development of skills and knowledge

## 2.2 Finance & Funding

The Malvern Hills Trust are fortunate in having been granted through its Acts precepting powers covering many, but not all, of the Parishes that adjoin the hills and commons. This precept provides a secure source of income to the organisation and has been regularly increased to reflect inflation. In 2016/17 income from the precept was £442,500, equal to 56 % of the expected annual core expenditure of £793,454 for that same year.

In addition to the precept, income is also generated from the ten Pay-and-Display car parks under the jurisdiction of the Trust, which together provide an income of over £225,000 per annum (approx. 31 % of the total income) .

The third main income source is grants from the Higher Level Stewardship Scheme. These funds totalled £184,000 in 2016, but the use of this funding source is limited to the management of the land which falls into the scheme. 90 % of the funds received are paid out each year in supporting the grazing management of the Hills and Commons.

MHT holds significant capital sums in three funds that are restricted in their use: the Land Acquisition Fund, the Parliamentary Fund and the Land Maintenance Fund. MHT has the ability to feed interest accrued on the Parliamentary Fund into the General Fund, but interest on the other two can only be used for the express core purposes.

### CHALLENGES

Superficially MHT's situation regarding income looks relatively positive. However, there are a number of major issues and threats regarding the Trust' income when looking at the next 5 years. The most significant include

- Uncertainty, following the vote to leave the European Union, over the Higher Level Stewardship and successor schemes
- increasing costs of servicing the pension deficit
- reduced rates of return on investments
- costs of materials and equipment exceeding inflation
- lack of income diversity

If MHT is to achieve all the aspirations of this Business Plan (together with the Land Management Plan and Interpretation Strategy) significant effort must be made to overcome our financial challenges which centre on

- effective budgeting,
- securing future grants,
- developing new, and existing, income streams, while
- controlling expenditure and ensuring efficient use of resources.

## 2.2.1 Budget Forecasting

With the advent of both the Business Plan and the Land Management Plan set over 5 year periods, it is critical that we provide forward budget forecasts for the same period to ensure that the works proposed are within our financial capability. This is particularly relevant to expenditure of funds from restricted or designated funds, and to identify those work streams and projects that require grant or sponsorship income in order for them to be achieved. The outline 5-year forward budget is shown in Part D

Updated August 2019

The 5 year budget forecast was produced with the original Business Plan along with the annual budget. A revised forecast for 2019/12 – 2023/24 will be presented once forward estimates for machinery and vehicle costs for 2023-2024 are determined.

## 2.2.2 Reserves Policy

Ensuring that the organisation maintains an appropriate level of working cash reserves to support the ongoing operational costs on a monthly basis is essential. The level of reserves needs to be monitored and regularly reviewed against medium term (6 month – 2 year) objectives of the Business Plan

Updated August 2019

An updated policy was put to Board for adoption in 2018. This was revised in 2019. Annual budget preparation and quarterly monitoring has to take heed of the thresholds within the policy and FAR are alerted to any variation away from the policy.

### ***New Element – Regular review***

As the risks and demands on the organisation change over the coming years, rigorous monitoring and oversight of the application of this policy is needed to ensure it remains fit for purpose. Every two years a proper review of its application, terms and suitability should be undertaken.

## 2.2.3 Pension Deficit

Servicing the pension deficit (£1.6m as at 2016) will place increasing demands on our General Fund each year as the employer pension contributions rise. Unless MHT is able to increase income, this will have the effect of taking an increasing proportion of our annual core funds, which in turn affects the level of funds available for the work we are able to undertake conserving and managing the Hills. A decision therefore needs to be reached on future Pension provision and a known, affordable repayment schedule for the deficit determined.

Updated August 2019

A full review of the pension arrangements and deficit was successfully undertaken through 2016 and 2017, with the introduction of a Defined Contribution scheme and an agreement reached with WCC Pension Scheme for the repayment of the deficit over the next 18 years. This action had provided

the organisation with a clear method for the discharge of the deficit, a cap on liabilities and a transition route to a wholly DC pension arrangement. However recent legal cases (McCloud case) have highlighted potential variability in the LGPS deficit calculation.

#### 2.2.4 Car Park Income

MHT needs to maintain the value of our car parking income – whilst ensuring that charges are reasonable and are effectively collected. The price of permits was increased in 2015 and day tickets in 2016. The existing car park ticket machines will become obsolete by 2018. A full review of the parking arrangements, the charging structure and the appropriate use of new technology needs to be carried out before replacement machines are ordered in 2017.

Updated August 2019

Since the commencement of the BP, the CEO and FAR Committee undertook a review of the charging policy, tariff levels and condition of the Car Park Pay and Display machines.

Consequently, a decision was taken to install a new suite of machines with card payment facility, now due in July 2019 (9 months later than originally anticipated). The single tariff will be continued with a further review of tariff levels to be considered one year after commissioning of the new machines.

The price of annual permits, both resident and non-resident is reviewed annually.

#### 2.2.5 HLS Grant Income

Current grant income comes primarily from one source – Higher Level Stewardship (HLS). The existing HLS agreements expire between 2017 and 2023. However, in the wake of the European Referendum result, there is great uncertainty over any successor scheme that will replace it, if any. This has thrown all agricultural and environmental funding streams into question after 2018.

If the income from HLS (and its successor schemes) falls, there will be reduced funds available to support the continued grazing of the commons. MHT will then face the dilemma of either topping up any short fall from other funds in order to maintain the grazing effort or reduce the funding for grazing. Any subsequent reduction in grazing would in turn create increased demands for machinery, staff resources and financial input if the level of management is to be maintained. Alternatively, strategies for dealing with a large scale drop in grazing effort, such as taking the management of the grazing in-house, would require additional capital cost and staff capacity. Lastly, any reduction in habitat management might result in our failure to deliver on the requirements of the SSSI and AONB status of the land.

Maintaining the income from grant schemes for continued grazing management is therefore critical, both for effective land management and financial affordability. MHT must therefore make best efforts to secure any future agri-environment

schemes that apply to our land. We must also undertake contingency planning to identify alternate financial and management options in the event of complete or partial loss of agri-environment scheme support for the grazing.

Updated August 2019

Maintaining the current level of grant income from Higher Level Stewardship (HLS) was identified as a key objective in the Business Plan. The Northern and Central Hills HLS scheme ended in early 2017 and was successfully replaced with a 10-year Countryside Stewardship scheme in January 2018.

While some degree of assurance has been issued by the UK government in relation to the short term continuance of agri-environment scheme funding through to 2021, the Agriculture Bill (Sept, 18) sets out targets for the introduction of a 7 year transition period for the Basic Payment System from 2021, with payments to farmers and landowners being reduced proportionately on a year by year basis after that date.

MHT receives only a small proportion of its income from Basic Payment System payments. However, many commoners, including most of those who are currently still grazing on MHT land, receive BPS payments and will see an expected change in income as a result of the move away from BPS. This may impact on the economic viability of their grazing operation in the future.

It is still not clear if Countryside Stewardship (or any other successor scheme that MHT will be eligible for) will still be in place after 2021. The Government objective of switching basic payments towards delivery of public services does however indicate that financial support for the agri-environmental management of the Malvern Hills should continue.

## 2.2.6 Fundraising and Income Diversification

As a charity, MHT currently under-uses its fundraising potential and there is a tendency to stick to what has been done in the past. The dangers of this are that the organisation stagnates rather than continues to develop, and that MHT becomes over-dependant on particular income streams (Eg HLS) which might then reduce or disappear. We need to find and implement alternative and innovative income streams over the life of this plan, such as; targeted appeals; corporate sponsorship; advertising (e.g. on car park tickets); a membership scheme; a visitor payback scheme (via local hotels, B&Bs and restaurants); charging for events; sale of product (eg firewood); private sponsorship of projects. Some of these initiatives will have to await the review of our governing acts before they can be brought into use. Others may be implemented relatively quickly.

Updated August 2019

The Business Plan calls for a range of initiatives and work elements to be undertaken to increase and improve fundraising and income generation. However, many of these are dependent on gaining wider fundraising and operational powers through the Charity Commission Scheme. With that scheme delayed several elements have had to be delayed –

**Membership scheme** – while initial investigative works into how a scheme might be set up and operated, it has not been possible to progress detailed plans as anticipated.

**Opportunities for Sales** – suspended pending determination of those powers in the CC Scheme.

**General Fundraising Targets.** While a general unrestricted fundraising income of between £10 – 15K has been achieved in the first two years, without the above initiatives further income gains have not been met. The targets of £20k and £40k unrestricted income have not been achieved, but there have been some significant restricted income grants achieved. Until the Scheme is completed and additional income avenues opened up to us, it is proposed that the target be revised to an annual income of £15k unrestricted and £30k restricted income.

***Proposed New Element – Fundraising Officer***

It is proposed that to deliver a greater upturn in fundraising income will require significant staff time. As staffing time is already at its capacity, a step change can only be achieved through a dedicated (either paid or voluntary) fundraising officer.

## 2.2.7 Donations and Legacies

With an estimated 1m+ visits to the Hills each year, coupled with their popularity, MHT should be well placed to secure donations and legacies to the charity. However, there is currently a limited scope for engagement with such visitors. Most simply pay a day visit and leave with no more interaction with our organisation than the purchase of a car park ticket. Donations and legacies make up on average less than 1 % of our annual income. Given how long MHT has been in existence and the popularity of the Hills this is a surprisingly low proportion and an area that needs significant development. Effective engagement with the public (see Communications) in a positive manner that encourages people to support our work is needed. With proper promotion, there could be greater funding support for specific projects and items through a Legacy Project List.

Updated August 2019

A number of elements and initiatives have been implemented in the first two years in relation to donations and legacies. A 5000 run print of a new legacy leaflet was completed in early 2018 and copies distributed to local firms of solicitors and other parties. Publicity was undertaken to coincide with national Legacy Week and a new program of promoting legacy projects was started with Tree planting and Interpretation panels being prioritised through the Trust Website and media releases.

One medium and several small legacies were received during 2018/19 from members of the public, with a further larger legacy being part received in early 2019. These have significantly increased the Trust's unrestricted reserves.

## 2.2.8 Investment of Capital

The organisation holds capital fund in three separate accounts (Parliamentary Fund, Lands Fund and Land Acquisition Fund) that are legally restricted in their use. In 2015 the Board took the decision to invest these funds both to secure better investment income returns and to protect the purchase power of those for future land acquisitions. Many of the capital items planned within the lifetime of this Business Plan and the Land Management Plan will require money from one or more of these funds in order for them to be delivered. It is therefore essential that both a clear plan of future expenditure from those funds is maintained and the performance of the investments regularly monitored. Such monitoring will form an essential part of the organisation's risk management strategy (see section 4.3.6 Monitoring and Controls)

Updated August 2019

Following adoption of the new investment policy, an investment management company has been engaged. Performance of investments is reviewed on a regular quarterly basis by senior management and members of FAR against clear criteria (eg risk level and benchmarks for returns.) To date, the investments have delivered against target.

The review of the capital projects list was completed and projections of costs included in the full business plan. This will need further review and amendment in light of changes in other policies - ie machinery replacement program, Charity Commission Scheme progress and costs.

## 2.2.9 Precept Income

Currently income from the precepted parishes, as permitted under the relevant Acts, accounts for approximately 50 % of our total income. Any increase in the level of precept paid is set annually by the Board. Large increases in the level of precept charged would be unpopular with precept payers and potentially could bring MHT into disrepute, unless such increases are for specific reasons which are effectively communicated and if possible shown to deliver major tangible benefits. The precepted areas were set out in the 1924 Act and since then MHT has significantly increased the area of land under its jurisdiction. Several more parishes now gain a direct benefit from MHT's management of land in their parish but make no contribution. The possibility of expanding the area or number of precept payers to all parishes served by MHT should be explored but would require legislative changes.

Updated August 2019

Increases in precept are being monitored and reviewed on an annual basis by FAR. In light of results to date of the Charity Commission Scheme works, further work on looking at options to increase the precepted area has been deleted from the plan.

## Finance and Funding - What do we want to have achieved by 2021?

Required Actions	Targets For 2021
Compile medium term 3-5 year <b>budget forecast</b>	To have completed the programmed works within budget. To have a clear picture of future budget commitments for 2022-2027, and plans are being implemented to ensure the financial commitments can be met.
Review and set clear <b>reserves policy</b> which takes into account good practice guidelines.	MHT holds adequate funds (in appropriately accounts) to meet our short and medium term expenditure needs at all times.
Reserves policy is reviewed.	Reserves policy is fully reviewed at least every 2 years.
Review the present <b>pension scheme</b> and make decision on future scheme provision. Implement any change required.	A decision on future pension provision has been made, any replacement scheme introduced and an affordable costed programme of repayment of the deficit is in place.
Carry out a full review of all the <b>car parking</b> , to include: <ul style="list-style-type: none"> <li>- The number of car parks where charges could be applied.</li> <li>- Options for separate short stay and long stay fees.</li> <li>- Possibility of weekly passes</li> <li>- Introduction of new ways of paying e.g. via mobile phone, credit/debit card.</li> </ul>	By September 2017 have a clear plan of future charging rates and ticket machine replacement
Monitor the situation in relation to <b>HLS and successor agri-environment schemes</b> .  Submit Applications for agreements at the earliest available opportunity.  Assess any likely shortfall in income from the scheme and ensure that we have a plan in place to deal with it.	MHT has entered all eligible land into any successor agri-environment schemes that are available. Any short fall in income has been identified and alternate income routes found, or the land management plan amended to take account of the income loss.
Establish a new Fundraising Officer post within the staff structure to achieve greater fundraising.	Fundraising post is in place and income through fundraising initiatives is beginning to be delivered.

<p><b>Increase and diversify our income</b> through grants, sponsorship and fundraising initiatives.</p> <p>Target income levels (minimum) for small grants and projects: Year 1: £20,000, Year 2 £30,000: Years 3-5 £40,000.</p> <p>To make a major grant application in region of £400,000 for Castlemorton Common.</p>	<p>Increased levels of income are coming from diverse sources – including donations, legacies, grants, appeals, corporate support, sponsorship or other new sources.</p> <p>Target Income from these other streams to deliver the current 5 year plan of £170,000 has been achieved.</p> <p>Major grant support for projects aimed at securing grazing management on the commons has been secured.</p>
<p>A legacy campaign is needed with clearly identified fundraising targets and a shopping list of non-time-critical items (boards, benches, paths etc): a Legacy Project List compiled.</p>	<p>We are receiving regular support through legacies for our work, and the Legacy Project List is being promoted and supported.</p>
<p>Review and monitor the investment strategy.</p>	<p>The investment strategy performance is regularly monitored and our target return rates for those investments achieved.</p>
<p>Annually review the precept levels and consider whether to seek a change to the precepted areas.</p>	<p>MHT continue to receive financial support from the precept for 50 % or more of its general fund income.</p>

## 2.3 Equipment

MHT owns and operates a range of machinery and equipment in order to manage the land holding. Much of this machinery represents a significant capital investment and its purchase needs to be planned for, and its condition properly maintained.

### 2.3.1 Vehicle Management

A policy on replacement of vehicles was adopted in 2015 and is partially implemented with a number of the vehicles having been updated. In the past there has been a tendency to retain vehicles for too long – only disposing of them when they are becoming very expensive to maintain in a roadworthy condition. The programme of vehicle replacement should continue to be implemented, and the replacement policy reviewed to ensure it still meets the future needs and any changing demands of the organisation.

Updated August 2019

The policy on replacement of vehicles, adopted in 2015, is being fully implemented with replacement wardens and estate staff vehicles sourced in 2016 and 2017. As with other machinery replacements, the policy needs to be kept under review to determine if best reliable economic life of vehicles is being achieved. It was amended in 2018 in relation to write off periods for tractors in light of increases reliability and residual values of those machines.

### 2.3.2 Plant and Machinery

A number of replacement and additional machinery requirements are identified in the Land Management Plan and will need to be sourced in the coming 5 years. As with the vehicles, this programme needs to be regularly reviewed to ensure adequate and appropriate machinery purchases can be planned for.

Updated August 2019

Plant and machinery replacements have been undertaken to date in line with the machinery replacement programme, although there have been some changes in the schedule of acquisition dependant on lifespan of certain pieces of equipment. The schedule needs further regular review to measure effective lifespan of respective equipment against their anticipated economical retention period.

## Equipment - What do we want to have achieved by 2021?

Required Actions	Targets For 2021
Implement vehicle replacement and maintenance programmes. Review the policy.	MHT operates a fleet of vehicles that are fit for purpose, well maintained, and represent good value for their investment.
Review and undertake plant and machinery procurement as planned	We have available the plant and machinery that provide effective tools in our work and are well maintained.

Reviewed 2019

## 2.4 Buildings

Many of the buildings owned by MHT show signs of long-term neglect and are in need of improvement. As a result, they present a poor image, continued lack of maintenance will lead to further dilapidation, increased costs, and have an impact on our ability to perform our work.

### 2.4.1 Manor House

In the short term this property is in need of partial refurbishment to improve its condition. Some initial uplift works have been commenced with minor improvements to the public entrance and the replacement of windows programmed to be carried out Winter 2016/17. Internal redecoration of parts of the building is also currently needed.

Medium term, there are further works that need to be considered to improve its functionality, including elements such as

- refitting the 2<sup>nd</sup> floor to provide additional desk space for staff , apprentices or volunteers,
- improving administration and visitor area functionality
- improving the kitchen facilities.

Beyond the medium term however, Manor House is reaching capacity in its current form and its public interface is poor. Therefore consideration needs to be given in the long term for either a large scale extension, or relocation of the main offices. A scoping study of needs for a new building should be undertaken with the aim of identifying the optimum operational space requirements. This should include consideration of elements such as car parking, office space for staff and volunteers, meeting rooms, workshop, public information area and front desk, storage and ancillary space amongst other factors. Following the scoping study an assessment of floor area and initial budget estimates can be evolved, based on the various options (i.e. extension, relocation to another existing building or a new-build). If the latter two options are included, factors such as access, public transport and proximity to services should also be considered at that stage.

Updated August 2019

The short term works of replacing the windows and improving the public entrance footway were undertaken and completed in financial year 17/18.

Feasibility studies have been undertaken on the wider refurbishment of the building, with architect and QS drawing up initial plans and costs. Due to the high costs the layout of plans and schedule of works is being revised. Implementation of any works is now expected in financial year 19/20.

The review of options for longer term relocation of the offices has been commenced but is held in abeyance pending decisions on Manor House

## 2.4.2 St Ann's Well

A programme of internal and external refurbishment was agreed in 2015/16 and construction firms invited to tender for the works which are expected to be completed during financial year 2017/18. Following completion of works a schedule of condition and programme of inspection and maintenance is to be drawn up.

Updated August 2019

A programme of internal and external refurbishment was agreed in 2015/16 and, following initial delays to the start of the contract due to planning requirements, the work were completed by December of 2017.

Following completion of works a schedule of condition and programme of inspection and maintenance was drawn up and is being implemented.

## 2.4.3 Top Shed

Works should be completed during 2016 for the installation of welfare facilities at this location. In the short term security also needs to be improved and the redundant inspection pit filled in. In the medium term consideration needs to be given to increasing the covered area to allow for safe storage of equipment and better working area.

Updated August 2019

Welfare facilities were completed at this location in 2016/17. Review for the storage capacity identified that the best improvement can be made with the infilling of the pits. Plans and Engineers assessment of the building prior to any infill of the pit have been completed but initial quotes indicate costs in the £10-15k bracket so works have been set back in the schedule.

## 2.4.4 Bottom Shed

The condition and usability of this building is not good. Currently used for storage of materials and hand tools, the fabric of building is in poor state. A review needs to be undertaken of the operational needs and security for buildings at this location. This to be undertaken in light of any wider development of other buildings (See 2.4.1 and 2.4.)

Updated August 2019

The review is yet to be completed. This is to be undertaken in light of any wider development of other buildings (See 2.4.1 and 2.4.)

## 2.4.5 Toilets

In 2019, the agreements with Herefordshire Council for maintenance of the toilet facilities at British Camp and the Wyche Cutting come to an end. Negotiations over these facilities needs to be carried out in 2017/18. In the short term, contingency plans need to be made to guard against the event that existing agreements with HCC are not extended.

Updated August 2019

Negotiations with local authorities over future leases and agreements for the toilets are being held with the respective Councils.

### **NEW ELEMENT – British Camp Toilet Soakaway**

Drainage Soakaway to British Camp toilets is in need of replacement with a new digester system to meet regulations due in in 2020.

## 2.4.6 Other Buildings

MHT is responsible for a number of other buildings and structures, including the toilet block at St Ann's Well, shelters at Wyche Cutting and West Malvern, and the farm buildings at the Hackett's. A full inventory of all buildings and structures on MHT land needs to be compiled, along with assessment of current condition. Schedules of planned maintenance for those that are MHT's responsibility also needs to be drawn up.

Updated August 2019

A full inspection was carried out of all MHT buildings in 2016/17 and an inventory compiled. Insurance values of the buildings were updated using an external consultant in 2017. A maintenance programme for these buildings has been drafted and is currently being applied. First elements identified for works in 2018/19 and 2019/20 were Wyche Cutting shelter / Belvedere (expected July 2019), and drainage works to St Ann's well (completed).

### **New Element- Donkey Shed Restoration**

It was identified from the inspection of buildings (2017) that the Donkey Shed could be restored as a historical agricultural building closely associated with the Victorian tourism use of the Hills. Consequently this has been taken off the St Ann's Well lease and plans put in place for its restoration. Those plans are currently going before Planning Committee August 2019 before works, expected in spring 2020.

## Buildings - What do we want to have achieved by 2021?

Required Actions	Targets For 2021
<p>Undertake refurbishment and improvement works to Manor House.</p> <p>Undertake scoping study for a future building development combining multiple uses.</p>	<p>Building is in good condition, secure, weatherproof, and provides an enhanced capacity of office and administration space.</p> <p>MHT has a clear understanding of what will be required from any new development.</p>
<p>Implement St Ann's Well refurbishment</p>	<p>The refurbishment works have been completed so that St Ann's Well is in good condition for the next 25 years, and a planned maintenance programme is in place.</p>
<p>Undertake works to Top Shed</p>	<p>Top Shed welfare facilities have been installed and the capacity of buildings is adequate for our needs.</p>
<p>Review purposes and needs of Bottom Shed</p>	<p>Site has been assessed and any replacement structure planned and built.</p>
<p>Engage in negotiations to ensure the toilet provision at The Wyche Cutting and British Camp continues.</p>	<p>Both toilet blocks are being maintained and operated at minimum cost to MHT.</p>
<p>Undertake restoration of the Donkey Shed Restoration</p>	<p>The donkey shed has been restored to a safe and suitable condition.</p>
<p>British Camp soakaway</p>	<p>The soakaway has been replaced with suitable system.</p>
<p>Undertake an audit and condition assessment of all other buildings and prepare maintenance schedule.</p>	<p>All other buildings are being maintained to a minimum standard on a regular basis.</p>

## 2.5 Information Technology

The use of Information Technology (IT) within MHT has developed significantly over the last 10-20 years and is now critical to the central operation and administration of the organisation. In some areas we have not kept pace with the technological changes over that same period. As dependency on out-of-date equipment increases the risk to the organisation of major system failure similarly increases.

### 2.5.1 Hardware

We need to maintain affordable yet dependable equipment that is current with existing standards. As a charity MHT should not be spending large sums on top-of-the-range electronic equipment, yet should ensure that equipment is reliable and can handle current mainstream standard software packages and ancillary equipment to allow effective communications. A full inventory of all equipment needs to be drawn up, together with a schedule of phased replacement of machines at appropriate age class. Existing maintenance service contract for the IT systems also needs to be reviewed and improved upon.

Updated August 2019

An IT maintenance and development plan was produced in 2016/17 subsequent to which a full replacement of the server, storage, email system and cybersecurity were implemented between February 2018 and July of 2019. A new IT support contractor was taken on in March 2018.

### 2.5.2 Software

Existing software systems need to be maintained at a level where they provide effective tools that are compatible with the current minimum specifications. In addition new software applications need to be properly assessed and implemented where they provide real gains to the organisation. In particular we need to develop our use of GIS (Geographic Information Systems) and ensure both that staff have the skills and time to use GIS to the full capacity.

Updated August 2019

Microsoft Windows 7 reaches the end of its supported life in 2019 and along with the upgrade of server and terminals over the last 2 years, necessary upgrades to software currently in use on all machines has been completed to date.

### 2.5.3 Security

Recent hi-profile breaches of security and loss of data at other organisations and companies highlight the need to maintain good security on IT systems, even for smaller organisations such as MHT. Security procedures of the whole of MHT's IT system needs to be fully reviewed as an early priority

## Information Technology - Our Aims For 2021?

Required Actions	Targets For 2021
Review scope and application of IT	MHT has the right level of IT provision for the organisation's needs, within budget.
Renew and update hardware and software.	All hardware is updated, of adequate power and capacity, and properly supported. Software is maintained properly and allows effective communications and administration.
Review all aspects of IT security.	There are appropriate levels of security across all areas of IT within the organisation

Reviewed 2015

## 3. Communications

MHT is responsible for managing the Hills in the face of increasing demands for a wide range of recreational access while simultaneously there has been a reduction in the levels of traditional uses such as the common-land grazing. It is often said that Malvern Hills Trust are not a tourism service; the Acts do not allow such a role and it is not MHT's function to duplicate the services of other local tourism information services.

However, providing clear and effective communication to the visiting public to ensure they are properly informed about where to go and how to use the Hills in an appropriate way, is a critical part of preserving the landscape, and a key target of the LMP. We also have a need to provide local residents and precept payers with information about what is happening on the hills, how their money is spent, and to respond to rapidly changing social demands on the Hills. Alongside this we need to maintain effective internal communications to enable efficient management of the organisation.

### 3.1 Public Communication

Effective communication with the visiting public is extremely important to MHT for a number of reasons.

- The Acts are long and complex and are supported by many byelaws that govern the use of the land. The vast majority of visitors to the Hills do not read the byelaw notices, and many access the hills unaware of the various rules and regulations,
- There has previously been criticism that MHT's communication with the local community and with visitors to the Hills is poor. A significant proportion of people do not seem to know who the Trust are. Many assume us to be part of the local authority and are not aware that we are a charity. Others assume, for example, that MHT's powers extend to planning, tree preservation orders, building conservation etc.
- By increasing public understanding of the work that is being carried out, we are more likely to gain public support for ongoing management and for any campaigns to protect the Hills from encroachments. It improves the overall public level of care when using the Hills which in turn has the benefit of reducing the amount of staff time spent dealing with complaints and queries.
- Having a strong brand and identity, coupled with clear communication of key messages, are important factors in gaining public engagement and trust. They are also powerful tools for encouraging grant awarding bodies to support the organisation.

- It generates more direct support for our work both in terms of greater volunteer recruitment and by encouraging partner organisations to engage with MHT

To achieve all this requires a clear communication strategy applied across a range of media that is appropriate to modern visitors and provides regular liaison and public information dissemination through website, leaflets, information boards, effective onsite signage and wider information campaigns.

To help achieve a more effective public communication system, and keep it up-to-date, in the past few years MHT has.

- set up an MHT Facebook page in 2013
- established a Twitter account in November 2014
- increased the number of press releases that we have issued
- created a Community and Conservation Officer (CCO) role in 2015
- compiled and adopted an Interpretation Audit and Strategy in 2015.

The CCO role has been highly effective in improving our communication with the local community and visitors to the Hills and Commons, as well as enabling us to take forward the first stages of the Interpretation Strategy,

Over the next 5 years MHT aims to fully implement the Interpretation Strategy, expand and improve our communications (both internally and externally), increase the level of public engagement, and develop new initiatives through digital media to enable better management of the Hills, in particular the public access issues.

(See 'MHT Interpretation Strategy' for further information)

Updated August 2019

### **3.1 Interpretation Strategy**

MHT aims to fully implement the Interpretation Strategy, compiled in 2015, over the current 5 year period. This strategy will however need reviewing in 2020 to keep it up-to-date and inclusive of current communication channels, especially electronic media.

#### **3.1.1 Brand Identity**

There is a need for the organisation to have a stronger, clearer and more public-friendly image that encourages greater understanding and engagement from the public in what we do. This is particularly important when it comes to issues of managing access and fundraising. While the term 'Trust' is an accurate description of what the organisation does, it lacks recognition and identity in our modern society. Many people regard MHT as a 'Victorian relic', rather than a reputable conservation organisation with a strong history of protection of the Hills.

A clearer 'brand' is needed so that the Trust, and the communications that are put out, are easily identifiable to the public, partners, funders, donors and other stakeholders. In 2015, in recognition of this and the need to update and strengthen many aspects of the organisation's brand identity, the Board agreed to undertake a rebranding exercise, and in November 2016 the project reached a successful conclusion.

Following the adoption of a new brand, there will follow an intensive period of work for the full and effective implementation of the rebranding exercise. This will include;

- Trademarking of new brand logos and designs to protect our intellectual property rights and safeguard against misappropriation
- Full public launch of new brand in the spring of 2017, across all media types and linked in with a new website and interpretation materials
- New signage at key facilities and public aspects such as car parks and vehicles.
- Following this MHT will need to undertake a full programme of replacement signage across the whole of the organisation, renewing old and out of date signs in the process. This will start with the higher profile locations, but eventually will cover several hundred signs and take several years to complete.
- Apply the new brand across all aspects of our media and communications in order to present a consistent and recognisable style.

Updated August 2019

Rebranding of the organisation as Malvern Hills Trust (working title of the Malvern Hills Conservators) was agreed in 2016/17 following commissioning of a new logo and corporate design identity. The new name and logo was adopted in April 2017 and rebranding of all the key areas of the organisation undertaken in the first few months.

The brand is now applied across all media and communications and has been well received, with a much improved public awareness of the organisation.

On site signage at all the major car parks and focal points has been changed but there remains a large backlog of small signs, interpretation boards and historical signage that needs replacing.

### 3.1.2 Website

The first point of contact for the vast majority of the public with MHT is through our website, and as such it has become a critical component of our communications strategy. The existing site, while operational, is out of date and lacks functionality across the range of platforms such as tablets and smart phones. In 2016 a re-work of the website was commissioned and it is anticipated that this will be up and running to coincide with the launch of the new brand in spring 2017.

Following the launch, the website will require regular monitoring and input in order to keep it current. This is particularly important in providing news about our work and events, updated information about access for visitors, information on the byelaws and further what activities are permitted as well as those that are restricted. New mapping features should provide clearer pointers for users to the car parks, paths and bridleway network as well as easier access to a much wider range of information than at present.

Updated August 2019

The new Trust website was commissioned, designed and launched on time to coincide with the public launch of the new brand identity in April 2017. It is a more dynamic site with mapping, video capability and feeds to social media and has cross-platform compatibility allowing better communications through mobile phone and tablet use. It has been reviewed this year (2019) with a number of minor amendments/ additions being recommended, which will be implemented in the third quarter of 2019.

The site also has the capability for intranet use by staff, volunteers and board members, although this element has to date received little use and will require additional staff time in the next two years to fully implement.

The specific target of investigating QR codes / NFC has been deleted as these will be reviewed annually along with many other developing technologies, apps etc to see if any serve our communication needs at any particular time.

A media policy was drawn up and adopted in 2016. As well as providing clear parameters and guidelines for the organisations use of social media it needs to be a document that is reviewed on a regular basis as social media systems and uses evolve.

### 3.1.3 Publications

We need to review and update our full suite of printed publications in order to conform to new branding guidelines as well as ensuring information provided is current and accurate. This applies to existing leaflets as well as any new ones produced in association with campaigns or new initiatives – e.g. a new community newsletter or leaflets handed out with residents' car park permits.

Updated August 2019

In pursuance of the plans objectives, during the first 2 year period the following leaflets and publications have been produced or updated;

- Legacy Leaflet
- Good Neighbour Guide
- Precept payers leaflet (2)
- Walking and Cycling map
- Cycling route guides (2)

The walking and cycling map and guide has been extremely well received and a second print run was commissioned in October 2018.

The updated jurisdiction map is to be printed during the current year (2019/20)

### 3.1.4 Signage

Updated August 2019

Following on from the rebranding of the organisation there was an extensive programme of signage replacement required through the 5 year business plan. As costs for replacing them all within one year were recognised to be excessive, the elements were spread across the years grouped by type. In practice this programme has been found to not be as appropriate as planned.

While some elements have been completed as scheduled – vehicle rebranding, main offices, staff clothing, St Ann’s Well and the main office building entrance signs as examples - elsewhere priority has been given to completing rebranding of all signs on a site by site basis, with priority going to the most high profile locations. The main car parks now have all their signage replaced, providing a consistent brand appearance to visitors. However there is still a large number of smaller, lesser signs scattered throughout the estate that needs updating, as well as some of the larger, high profile interpretation boards. These have been prioritised for funding from public donations with the anticipation that they will be replaced over the next 2 -3 years.

### 3.1.5 Events

This is an area of work that has only relatively recently been expanded, but has proved to be popular. An annual events programme has been implemented offering a series of free walks, talks and courses aimed at increasing knowledge and understanding of the wildlife, geology, history and management of the Hills. It provides a valuable interface with the public and as well as serving as an education function for users of the Hills, and it provides MHT with the opportunity to reinforce the messages about the work that is undertaken.

We need to review and expand this events programme further. This can be achieved by developing elements such as more drop-in Wardens Walks around key sites; organising an Open Day; renewing our attendance at major events such as the Three Counties Show; and providing talks to different user groups. Keeping the range of events fresh and informative and relating them to our key campaign messages (see below) is also important. An expansion of our events programme will absorb more staff time, so this will need to be supplemented by making better use of volunteers in these roles. To help achieve all this will require an increase in the range of materials and equipment available to service these events.

Updated August 2019

So far each year an annual events programme has been compiled and successfully implemented. Public response has been generally good with most events receiving good numbers of attendees, and those that have been poorly attended have been reviewed or dropped in favour of more popular themes and activities.

In 2017 the Trust attended the Three Counties Show as an exhibitor but this was not repeated in 2018 as it was anticipated that the (subsequently postponed) public consultation on the Charity Commission Scheme would be in full swing at the time.

A Hills and Commons Event was proposed as a more Hills focused alternative to attending the 3 Counties Show. This was postponed pending the public consultation process. This event will be reviewed in 2019/ 20 to see if it is still required.

Display materials were updated as planned in 2017 with new branding and logo.

### 3.1.6 Press and Media

As well as providing a prompt and strong response to current issues in the media that concern the Hills, MHT also needs to identify key messages that we want to communicate to the public – messages which better explain who MHT are, what it does, how it's done and why the work is important. To achieve this requires positive engagement with the media and generation of stories that showcase the positive aspects of our work. We also need to produce those regular stories across the full range of media including both the traditional broadcasts and newspapers as well electronically through our website and across social media platforms (e.g. Facebook and Twitter). Some of this work has already been implemented, but more will need to be done in the coming years to focus on the key areas, such as to highlight the fact that MHT is a charity and promoting fundraising and campaigns.

In addition, MHT also needs to identify new ways of communicating key messages to the public. For example, exploring options to put information on the reverse of car park tickets and permits, developing and using digital apps for smart phones for recreational users of the Hills, as well as keeping up with other technical innovations in communications.

Updated August 2019

Press take up and coverage of stories initiated by the Trust has been positive over the past 3-4 years, with many Trust initiated articles appearing in the local Malvern press, as well as in the area. Where articles have appeared featuring the Trust in connection with controversial topics, as inevitably will happen, in most cases comment from the Trust has been sought and printed, providing balance to the issues. In a few cases there have been inaccuracies printed and where appropriate these have been raised with the papers, and regular monitoring of press coverage is always required.

There has also been a good level of uptake of topics by the local radio stations and some national television coverage, such as *Countryfile Diaries* during 2018.

Online interaction with the public has also seen significant improvements over this period, with the new website and social media platforms proving generally successful. The website format has been reviewed summer 2019. It has to be

recognised that in a few cases single interest groups have sought to reduce our social media public rating scores as a way of pursuing their own particular agenda. Prompt and strong, reasoned on-line responses have proved to be the best way of managing these tactics.

### 3.1.7 Delivery

In order to effectively deliver many of these targets over the coming 5 years, it is critical that adequate staff resources are given to the communication role, particularly in respect of the external public communications. Money spent on this should not be considered an optional extra – good public communications can resolve conflicts, reduce problem activities that impact on our land management or create extra workloads elsewhere in the organisation, as well as facilitate donations and fundraising efforts. The Community and Conservation Officer role is key to this work and the post needs to be established as a permanent role within the organisation (See Resources – Staff). There is also a need to ensure our routes of communications are kept up to date, and opportunities for using electronic media platforms (such as social media sites, mobile phone apps and QR codes) to communicate with the public are effectively used and maintained.

Updated August 2019

Following on from the implementation of the rebranding, staff branded clothing was updated and issued in April 2017. Also during early 2017, the Community and Conservation Officer post was made a permanent role, in recognition of the importance of maintaining positive and effective public communications.

## Public communications - What we aim to achieve by 2021?

Required Actions	Targets for 2021
Implement the full range of actions set out within the Interpretation Strategy	<p>The aims of the Strategy have been met and</p> <ul style="list-style-type: none"> <li>- There is a clear understanding amongst the local community and visitors to the Hills of who we are, what we do and the difference that our work makes</li> <li>- There is a widespread awareness that the Trust are a charity</li> <li>- There are a clear set of key messages that have been communicated to the public and other stakeholders</li> </ul>
Launch new branding	There is in place a clear image and brand that is universally applied, widely recognised by the public and distinguishes us from other organisations.
Renew and update the website	By middle 2017 there is a modern, professional, easy to navigate and mobile/tablet friendly version website which communicates key messages about the Hills and the work of the Trust. We have lively social media pages updating people on our work and inspiring comment and discussion.
Update of all signage throughout the organisation.	All signage bearing the old branding has been replaced with clear, consistently branded signage which serves all the necessary functions, provides public information about the Hills, and communicates the importance of the work that we do.
Review and update all publications.	There is a full suite of current and accurate leaflets carrying the new brand, which communicate the priority messages, and tie in with all campaigns.
Build a more positive and mutually beneficial relationship with the local press and broadcast media.	Articles regularly appear in the local and regional media regarding MHT's work and highlighting its importance to the Hills, their wildlife, the local community and visitors.
Other Communications	Our new brand is used on all staff clothing. Old branding does not appear.

## 3.2 Campaigns

It is important that MHT continues to develop appropriate publicity campaigns to address some of the key issues that relate to the Hills. Effective campaigns will raise awareness of the issues, educate the public about the impacts they have and provide a consultation route for any future changes in management and regulation of the Hills.

Over the coming 5 years it is anticipated that the main campaigns will focus on mountain biking, dog walking, and parking issues, as well as one aimed at promoting legacies towards MHT. However, MHT needs to remain flexible in its approach and respond to any new issues that may threaten to have a significant adverse impact on the land we manage - whether as a result of public recreational uses or through other factors such as changes in agricultural practices, commercial use or inappropriate development.

Updated August 2019

It was highlighted in the Business Plan that it is important MHT continues to develop appropriate publicity campaigns to address some of the key issues that relate to the Hills. The first of these programmed campaigns was directed at mountain biking, and trying to reduce some of the controversy and damaging practices associated with some cyclists. The campaign has run for 9 months longer than originally planned and has increased through 2018 and 2019 with the introduction of the walking and cycling guide and map, and introduction of the three waymarked routes for cyclists. With the implementation of the third route, designation of the permissive cycle paths to link up broken sections of legitimate access and reprint of the maps, the campaign has now been largely completed. However efforts to maintain public awareness of responsible mountain biking will be continued.

### 3.2.1 Mountain Biking Campaign

Already underway, its aim is to encourage safe and responsible mountain biking. The campaign will encourage responsible riding, promote a recognised network of routes that cyclists can legitimately use and thereby reduce both conflicts with other users and the impacts of erosion and damage to the landscape caused by mountain bikes.

Updated August 2019

Completed

### 3.2.2 Dogs and dog walking

Dog walkers are the single largest user group of all those who regularly access the Hills and Commons, the campaign will highlight the need for responsible dog ownership, including keeping dogs under control, particularly around livestock, removal and disposal of waste, and minimising impacts on wildlife. The main action points of the campaign may include,

- production of a leaflet;
- spreading information via the website and social media;
- recruiting dog walkers as ‘ambassadors’;
- handing out free dog waste bags;

- installation of new signs;
- reviewing future provision of dog bins;
- press articles etc.

Updated August 2019

To start 2019

### 3.2.3 Parking

A campaign is required to highlight the need to park responsibly within designated areas, reduce damage to the landscape by not parking on verges, underline the issues of unauthorised parking on easements and improve the behaviour of vehicle drivers while on MHT property.

Updated August 2019

To be commenced in late 2020. This needs to be linked in with upgrades and changes to the car parks as scheduled in section 1.2.1

### 3.2.4 Legacies

A legacy campaign is needed that engages with the public and encourages those with a passion for the hills to leave legacies to MHT to help care for them. This long term fundraising approach can have major benefits in terms of future resources available to MHT, both for maintenance and further land acquisition.

Updated August 2019

A short legacy campaign was carried out in 2018 that ran up to over and beyond the national Leave a Will week. A new legacy leaflet was printed and distributed to all local solicitor companies, and legacy related sponsorship projects promoted through the website.

While reprints of the legacy leaflet will not be required each year, the promotion of legacy projects during the national promotion week will be carried out each year.

## Campaigns - What we aim to achieve by 2021?

Required Actions	Target For 2021
Undertake Mountain Biking Campaign in 2017/18	Campaign has delivered <ul style="list-style-type: none"> <li>- clear information and way-marking of a network of routes that cyclists can use.</li> <li>- a reduction in conflict between mountain bikes and other users.</li> <li>- Reduced erosion and unofficial cycle tracks.</li> <li>- A positive relationship with cyclists.</li> </ul>
Undertake Dog Walking Campaign in 2018/19	Campaign has delivered <ul style="list-style-type: none"> <li>- clear information and publicity about responsible dog walking on the Hills.</li> </ul>

	<ul style="list-style-type: none"> <li>- a reduction in dog mess, dog attacks on stock and dog related conflict with other users.</li> <li>- A positive relationship with dog walkers.</li> </ul>
Undertake Car Parking Campaign in 2019/20	<p>Campaign has delivered</p> <ul style="list-style-type: none"> <li>- clear information on parking provision across the hills.</li> <li>- a reduction in byelaw offences relating to parking.</li> <li>- Reduced erosion / damage from unlawful parking.</li> </ul>
Undertake Legacy Campaign in 2017/18	<p>Campaign delivered</p> <ul style="list-style-type: none"> <li>- An increase in the number of enquiries relating to wills and legacies in favour of MHT.</li> <li>- An increase in the support of project items on a Legacy Project List.</li> <li>- Higher awareness of our charity status.</li> </ul>

Reviewed 2019

## 3.3 Partnership

All the activities undertaken by MHT are restricted by our Acts of Parliament. Changes in our governance are planned that, if fully implemented, will give us greater flexibility in the way MHT as an organisation can carry out its primary duties (see Governance section).

There are currently a number of projects which would benefit MHT and/or users of the Hills which fall outside MHT's powers. In some cases, it may be appropriate to work in partnership with other organisations to develop these projects.

### 3.3.1 Disabled Access By Vehicle

There is a desire to see the provision of vehicular transport onto the Hills, and in particular Worcestershire Beacon, for people with disabilities. There are currently two initiatives being run;

- The Trampler project, which is a collaboration between the AONB and Wyche Innovation Centre. This project provides access to an all-terrain mobility scooter for people with limited mobility yet are able to control such a self-propelled vehicle. MHT's role is to facilitate access for the vehicle up the Beacon track.
- The Landover Experience / Rotary access programme, which has been trialled in 2016. This scheme enables professionally driven Land Rovers, on a limited number of days, to provide small groups of limited-mobility individuals with a means of access the Beacon. Again, MHT's role is facilitating access for the vehicles. MHT will aim to maintain these partnerships and be prepared to engage with other potential projects that provide similar access arrangements, where appropriate.

Updated August 2019

Since the initial development of the two access projects in 2016, they have continued to run with some success. The Trampler project, sponsored through the AONB has seen regular use by public members with limited mobility wanting to access the main track to the beacon. Additionally, each year so far the local Rotary group with Land Rover Experience of Eastnor have run a number of specialist access event days taking those with more significant mobility issues up to the Worcester Beacon.

### 3.3.2 Educational Projects

Formal educational programmes are not within MHT's remit. However, there is clear benefit to MHT from appropriate educational use of the Hills by schools, colleges, universities and youth groups. There may be opportunities for MHT to gain a shared benefit from such group's activities – e.g. through development of new ideas such as remote sensing of habitats, collection of environmental data or execution of surveys. MHT should be prepared to engage with suitable partner educational organisations and facilitate such programmes where there is an identified benefit to the Hills.

Updated August 2019

Throughout the first two years there has been continued efforts to engage with local educational organisations on projects and initiatives linked to the hills. While staff

and volunteer time for these areas is severely limited, there has been walks, talks and activities for schools carried out on a regular basis. One partnership with a local initiative from the Malvern Outdoor Centre expected to run in 2018 was unsuccessful in getting started due to lack of funding but may be run in the coming years.

### 3.3.3 Wider Landscape Initiatives

There is increasing emphasis on the need for landscape scale conservation. These encourage conservation measures that go beyond the boundaries of existing protected areas but use protected areas, such as the Malvern Hills, as 'reservoirs' for the expansion of habitats and species out into the wider countryside. MHT's jurisdiction does not extend beyond the boundaries of the land under our ownership, but there is often an important liaison role for MHT in those habitat connectivity programmes led by other partner organisation such as the AONB, Wildlife Trusts or similar groups.

Updated August 2019

There has been limited capacity or opportunity in the first two years for the Trust to engage greatly in wider partnership initiatives. Those that have been engaged with have been related to current consultations ie South Worcestershire Minerals plan.

### 3.3.4 Agricultural Product Marketing

There are potential opportunities for farmers grazing the Hills to increase their income through a marketing scheme based around a Malvern Hills brand. Such a scheme may help with the financial viability of local grazing which in turn may help to secure the future of grazing on the Hills. Work on developing such a scheme falls outside MHT's current powers (and expertise) but in order to see this progressed a partner organisation will be needed who is willing work with the graziers in its development.

Updated August 2019

There are potential opportunities for farmers grazing the Hills to increase their income through a marketing scheme based around a Malvern Hills brand. Such a scheme may help with the financial viability of local grazing which in turn may help to secure the future of grazing on the Hills. Work on developing such a scheme falls outside MHC's current powers (and expertise) but in order to see this progressed a partner organisation will be needed who is willing work with the graziers in its development.

### 3.3.5 Route to The Hills

The MHDC led *Route to the Hills* project has been successful in securing a grant from the Heritage Lottery Fund and is currently being implemented. The project does not directly impact on MHT land or work, but indirectly it could have an impact on the numbers, locations and in particular the pathways that visitors use to access the Hills. It is important therefore that we engage with MHDC on this project to ensure any subsequent impacts on our land areas are manageable.

Updated August 2019

The MHDC led *Route to the Hills* project has been successfully completed in a number of locations, where it bridged onto land under MHT control, liaison has been undertaken to enable the project to be brought into completion.

### 3.3.6 Tourism Interface

While MHT does not carry out a general Tourist Information role itself, it does provide a limited range of public information about the Hills, both directly and through the MHDC Tourist Information Centre for onward distribution. We need to review the range of information provided and the routes by which it is reaching visitors to ensure it is being effectively used. Consideration also needs to be given to the effectiveness of any existing (and future) links to tourism or accommodation providers.

Updated August 2019

The Trust has continued to engage with and work in partnership with the Malvern Tourism Information Centre through its relocation in 2019, with continued supply of copies of leaflets, walking and cycling guides and maps, and provision of Residential Car Park Passes. The ongoing provision of the last of these through the TIC remains in doubt, although the provision of Resident Passes through Colwall library was successfully started in 2018.

Reviewed

## Partnerships - What do we want to have achieved by 2021?

Required Actions	Target Output By 2021
Facilitate partner organisations who are interested in providing disabled access	There is some form of partnership provision of vehicular access to Worcestershire Beacon for people with limited mobility.
Develop links to organisations with educational or similar objectives that could support our management of the Hills.	We have one or more partner organisations undertaking educational activities on the Hills.
Engage with landscape scale conservation projects where appropriate.	Our interests are represented in any large scale landscape projects that include all or part of the Malvern Hills
Encourage and engage with the organisations developing schemes aimed at marketing agricultural products from the Hills	There is at least one marketing programme for Malvern Hills agricultural products that enhances the viability of grazing on the Hills
Engage with the Route to the Hills Project	That where R.t.t.H. has been implemented, it ties in with MHT's long term management aims for the Hills
Maintain links with tourism information providers and ensure they are provided with current and relevant information.	Tourist information providers have <ul style="list-style-type: none"> <li>- access to accurate and relevant information, which they can provide to the public, regarding access and use of the Hills.</li> <li>- we have a good working relationship with those partners.</li> </ul>

## 4. Organisation and Infrastructure

### 4.1 Governance

MHT started an internal review of its governance arrangements in 2013. The Governance Handbook was completely reviewed, and new governance policies and procedures drawn up. As a result of the review these are now being embedded within the organisation. The Governance Committee is primarily responsible for maintaining a continuous review of the suitability and effectiveness of governance arrangements.

The review has identified certain changes that are needed but which require amendment of the Malvern Hills Acts. For example, there is widespread agreement that the Board, with 29 members, is larger than the optimum for effective operation. It is also recognised that, whereas the majority of charities are able to select Trustees to ensure that the Board has a good balance of the skills needed to govern the organisation, MHT cannot do this. Therefore, there is no means of ensuring the Board has the skills, knowledge, commitment and experience required to effectively oversee the organisation. The review also identified where MHT's power either need to be updated, clarified or extended to enable it effectively to manage the land under its jurisdiction in the 21st Century.

#### 4.1.1 Charity Commission Scheme

With these essential changes in mind and following advice from lawyers and approval from the Charity Commission, the Board is currently (Autumn 2016) considering the preparation of a scheme under s 73 Charities Act 2011 which will amend MHT's governing documents.

This is a major, time consuming and costly undertaking, but if successful would modernise MHT's administrative arrangements, clarify the interpretation of the Acts and make it possible for MHT to operate more effectively. In particular it will provide much more flexibility in the way we operate, for example by including powers to undertake a more diverse range of fundraising activities, and, with appropriate safeguards, allow better management of grazing animals on the Hills.

However, before such a Scheme can be put before Parliament it will require considerable administrative and legal input and a period of public consultation amongst all stakeholders. It is anticipated that the project will be ongoing for a significant part of the life of this Plan (target date for completion currently 2019).

Updated August 2019

Extensive preparatory work has been undertaken through 2017-19 on the foundation structure of a scheme by Trust staff, board members and the Trusts specialist solicitors on the project. By spring of 2019 most issues had been considered and, where appropriate, amendments or alternate arrangements put forward. Delays in getting critical answers from Government departments

have slowed this key project down from its original planned timeline, such that it is now running 1 year behind schedule. Costs have also exceeded the original estimates, although the scope and detailed progress of the scheme is further advanced than originally planned.

While the Trust waits on a few select outstanding answers to be forthcoming from Government departments, it is planned to undertake the public consultation into the scheme in the autumn of 2019 and preparations for this are currently underway.

With successful completion of the consultation and answers to the remaining questions anticipated for the end of 2019, it is now anticipated that the scheme may be put forward to the Charity Commission, DCMS and subsequently Parliament during 2020.

#### 4.1.2 Business Continuity Plan

At present we have no business continuity plan to guide the organisation in the event of a serious unexpected incident e.g. fire, flooding, or sudden loss of a senior member of staff. Whilst it is hoped that such a plan will never be needed, it is essential so that the organisation is ready to deal with any catastrophic event. Such a plan will also need to consider less sudden, but equally serious factors that might impact on the work of our organisation, such as a rapid increase in local incidence of tree diseases (*Phytophthora* or *Chalara*) or other major environmental factors e.g. such as another outbreak of foot and mouth disease.

Updated August 2019

While some constituent elements of this have been considered or reviewed to date (Severe Weather Plan, Staff succession planning and key person insurance, financial reserve policy) these have as yet to be drawn together in one Business Continuity Plan. This is now scheduled for 2020.

#### 4.1.3 Strategic Land Acquisition Plan

We have a Land Acquisition Fund, but it is limited both in its size and application. Therefore MHT needs to prioritise the purchase of land which is of most importance in the context of the landscape, wildlife or recreational use of the Hills. The outcomes of such an exercise need to remain confidential as it might otherwise result in locally inflated prices for suitable land, or parcels not being brought to market. Our Land Acquisition Policy needs to be reviewed and updated so that action can be taken swiftly if priority land comes onto the market. It also needs to include consideration of strategic acquisitions such as in-by land parcels that enable greater security of future grazing management.

Updated August 2019

2018 /19 was a significant year in terms of land acquisitions as four separate pieces of land (three grassland and one woodland) totalling approximately 10.8 hectares (26 acres) lying within or adjoining the Trusts existing estate were acquired.

The land acquisition policy is in need of reviewing and in particular its prioritisation and scoring basis for prospective additional land will need to be considered.

#### **4.1.4 Policy Reviews**

A wide range of policies have been adopted by the Board to provide a framework for a consistent approach by MHT on a diverse range of management issues.

There has however never been a system for appropriate review. Elsewhere some have simply become established through historical precedent of their application.

A schedule of all policies has now been compiled and they will be reviewed over the lifetime of this plan.

Reviewed 2019

## Governance - What do we want to have achieved by 2021?

Required Actions	Target Output By 2021
Undertake a detailed review of MHT's governing documents, secure Board approval for a Scheme under s73 Charities Act 2011, undertake appropriate public consultation and request the Charity Commission put the Scheme before Parliament.	We have a set of clear, unambiguous governing documents which enable MHT to operate effectively in the 21 <sup>st</sup> Century and enhances our ability to achieve our objects.
Prepare a Business Continuity Plan	We are prepared and able to continue to operate effectively in the event of a major unexpected occurrence e.g. fire, flooding, loss of senior member of staff.
Update our Land Acquisition policy.	We have clear criteria and priorities for future land acquisition.
Undertake a review of all our existing policies to ensure they are fit for purpose	We have a full suite of up to date policies covering all aspects of our work.

Reviewed 2015

## 4.2 Legal

Some legal issues, specifically those relating to the Malvern Hills Acts, are dealt with under 'Governance'. However, there are a number of other legal issues which need to be addressed over the coming years.

### 4.2.1 Boundaries

MHT is an unusual organisation in that it both owns land and has land placed under its jurisdiction by the 1884 and 1924 Acts. Inevitably, given the complexity of this large land holding, issues arise from time to time in connection with boundaries. MHT has undertaken voluntary registration of its land holding but occasionally anomalies still come to light. These can arise from uncertainty of the extent of the land placed under MHT's jurisdiction or conveyed to MHT, as a result of less accurate historic mapping techniques and the small scale of some of the plans. It is impossible to comprehensively track down all of the possible anomalies in advance, but it is important that as each arises, the boundaries of all our land parcels are more clearly defined and registered in the coming years.

There is also a need to install boundary markers in some areas on the perimeter of our property where there is no boundary feature, to publicly and permanently demark our ownership (See Section 1 – Land Management)

Updated August 2019

A number of anomalies in registered extent of Trust land have come to light in the first two years of the business plan, as anticipated. In each case the issue has been investigated and where possible the registered title corrected to better reflect the correct boundary position. Further anomalies are anticipated to come to light in the coming 5 year period.

A survey being undertaken by wardens and volunteers has been commenced and will continue for the next two winter seasons. Additionally new boundary markers have been laid in three new locations to define the boundary of Trust land ownership.

### 4.2.2 Byelaws

The Malvern Hills byelaws were last updated in 1999. A review of the byelaws should be undertaken during the life of this Plan, to ensure that they remain relevant and up-to-date.

Enforcement of the byelaws is the responsibility of all officers of the Board but falls primarily to the Wardens and Director. MHT's powers of enforcement are in practice very limited - Officers of the Board can in theory remove or exclude anyone contravening the byelaws from the Hills and impose fines. In practice the power to forcibly remove byelaw offenders cannot be used, although Officers can remove items left on MHT land. Officers can ask but cannot compel members of the public to give their name and address and fines can only be raised on summary conviction – which is impossible without an offenders name and address. As a result, the wardens sometimes have to ask the Police to attend incidents and if

they are not available then enforcement is impossible. Current working relationships with the Police are good, but they often have other more pressing demands on their time. Consequently, Byelaw breaches are more usually tackled by giving advice and by persuasion rather than enforcement

Consideration needs to be given to finding better ways of bringing the byelaws to the attention of members of the public, as they cannot be expected to comply with rules that they do not know about.

The Charity Commission Working group gave extensive consideration to whether MHT should try to extend its powers of enforcement but concluded that in practice MHT's interests would best be served by working harder to educate users of the Hills about what is appropriate behaviour.

Updated August 2019

Whilst initial work was undertaken in the redrafting of the byelaws, this work stream has been suspended pending the development of the Charity Commission Scheme.

### 4.2.3 Legislative Compliance

MHT conscientiously aims to comply with the full range of legislation which applies to its operations. This includes, amongst others, the law in relation to employment, health and safety, data protection, freedom of information and environmental protection.

There is a need to produce a full list of all legislation which directly affects MHT's work, and ensure that we have a working understanding of those regulations to ensure we are operating in compliance.

There is a particular need to review our procedures in relation to Health and Safety legislation. The health and safety of staff, volunteers, contractors and visitors is of paramount importance, and while there is a good safety culture within the organisation policies and procedures need to be updated against current standards. A full audit of Health and Safety arrangements is being undertaken, which will identify gaps in our provision as well as areas where updates are necessary. This exercise should then be repeated on a regular basis.

Updated August 2019

Work has been undertaken in the first two years to ensure that the Trust remains compliant against all regulatory requirements. New procedures and policies have been introduced where required (ie GDPR policy and procedure, 2018.) This work has to continue with policies and procedures reviewed on a regular basis to ensure they are current and up to date in line with any changes to regulations.

### 4.2.5 Licences and Agreements

There are a number of agreements in place to licence use of our land for grazing and other activities. We also lease some areas of the Hills from other bodies e.g. a small area from Little Malvern Estates. A schedule of all leases and licences needs

to be prepared which includes the renewal dates to ensure that they are reviewed in a timely manner.

In particular the lease on St Ann's Well is due for renewal in accordance with the provisions of the current lease.

Updated August 2019

A schedule of all leases and licences is in place and includes advance notice of the renewal dates to ensure that they are reviewed in advance of any change. To date all leases and licences have been renewed in a timely manner.

The lease on St Ann's Well was renewed on completion of the refurbishment works in December 2017.

Reviewed 2019

## Legal - What do we want to have achieved by 2021?

Required Actions	Target Output By 2021
Identify and resolve any known boundary issues	All known boundary issues have been resolved. The position of boundaries where there is no defining boundary feature have been marked.
Undertake a review of the current Byelaws and amend if required.	We have a set of byelaws that are appropriate to current needs and are enforceable. There is an increase in public awareness of the impacts of inappropriate use of the Hills coupled with a reduction in breaches of the byelaws and problem behaviour.
Identify all legislation relevant to the activities of MHT, and monitor compliance.	A full register of relevant legislation is in place. Staff are conversant with the law that applies to their work areas and the organisation is monitoring compliance.
Undertake a review of Health and Safety Policy and update all internal and external H & S procedures.	Confidence that MHT is fully compliant with current Health and Safety legislation and an excellent safety culture within the team of staff and volunteers
Compile register of all leases and agreements and ensure that all reviews take place in a timely fashion.	All licences, leases and agreements are up to date, with MHT interests properly secured.

## 4.3 Monitoring and Controls

Underlying many of the aims and targets set out in this plan, is the need to monitor both our internal operations and the external factors that impact on MHT's activities and the land under its management. Effective monitoring is an essential management tool and enables early action to be taken to alter our plans to meet changing demands or objectives.

### 4.3.1 Land Use and the Planning Process

The Acts impose a duty on MHT to protect the Hills from building and encroachment. Monitoring development applications is a useful tool to identify where work on adjoining land might be occurring. It is important to be clear that MHT has no remit to comment on development unless it will either directly encroach on MHT land or materially affect its use in accordance with the Acts. On occasions it may be appropriate comment or register an objection to an individual application.

MHT is contacted regularly by members of the public with requests that it object to planning applications which they oppose. This underlines the fact that there is a lack of understanding about MHT's function and what it is appropriate for MHT to comment on.

The policy on planning applications needs to be reviewed so that the criteria for commenting is clear, both to staff and members of the public.

Updated August 2019

The Acts impose a duty on MHC to protect the Hills from building and encroachment. Monitoring of development applications are undertaken on a weekly basis and where appropriate, comment or register of an objection to an application has been carried out.

The existing policy on responding to planning applications needs to be reviewed, but in light of other pressures is a low priority item. This has been deferred in the work program to a later date.

### 4.3.2 Environmental Appraisal

The environmental performance of the organisation should be reviewed. This should be used to inform decisions regarding e.g. the refurbishment of Manor House and any successor building, selection of vehicles, replacement equipment or other procurement.

Updated August 2019

The environmental performance of the organisation has only been partly reviewed to date. Elements considered have been - use of electric vehicles by wardens and field staff to reduce petrochemical use and emissions and interim consideration of environmental improvements that could be made to Manor House. These will be incorporated in plans for refurbishment due in 2019/20. Due to limited staff

capacity and high demands from other key projects, the full review and report is to be deferred to 2020/21.

### 4.3.3 Record Keeping

The organisation has an important and large archive of historical records relating to all aspects of its work, from historical documents relating to the hills and commons before MHT was created, correspondence and minutes of meetings, to deeds to MHT land. An archiving and indexing project has been started for the historical documents and is being undertaken by a team of volunteers. This current work needs to be completed and extended to recent correspondence. As well as maintaining the historical records, MHT needs to ensure that records of all decisions and actions are properly maintained in searchable format, especially as much of the written records are now held in digital form. The new filing system needs to be fully implemented across all areas of operation, with secure backups of the modern records, and these records need to be accessible and fully indexed. MHT also needs to make arrangements to upload all maps from the legal documents relating to our land holding onto a GIS system. Using such an integrated system will allow a quicker, more effective way of searching for information relating to a particular site. This is however a major project which will require external input and further staff training.

Updated August 2019

Thanks to the dedicated efforts of a small group of regular volunteers, the archiving project has progressed well. Systematic referencing and filing of all deeds, licences and agreements, correspondence with neighbours, photos, maps and plans has greatly improved the speed and accuracy of information retrieval. There is still some filing outstanding and the key issue of integrating the digital files with older paper files is ongoing, but major advances have been made.

With the upgrade of the server and related software in early 2018, plus work to comply with GDPR in the same year, the security of the digital filing is greatly improved. Work still needs to be carried out to fully integrate old digital files with the new systems and this is anticipated now to take a further 2 - 3 years to complete.

Work on uploading deed maps to the GIS system is still to be started as it will require external input, funds and further staff training.

### 4.3.4 Incident Reporting

Maintaining a system of recording incidents that occur on MHT land allows us to monitor and recognise changing trends in public use of the hills. It is also essential to provide evidence in the event that enforcement action is taken. Effective recording means MHT can respond to certain byelaw breaches (such as fly tipping in particular locations, repeat car parking offenders, damage to trees or theft from car parks) by making appropriate changes in management or enforcement action. The wardens currently maintain a log of such incidents and this needs to be expanded so that other staff are also feeding incident reports into it. We also need

to regularly undertake reviews of those reports to spot any changing patterns in behaviour.

Updated August 2019

A system for recording all Warden reported incidents has been introduced, each tagged with date and time, location, crime number if relevant and photographic records.

#### 4.3.5 Complaints and Compliments

It is not possible to maintain the whole of our land in perfect condition, and the public have a wide range of opinions on how the Hills should be managed, so complaints are an inevitable part of our daily operations. We need to ensure we maintain a polite, consistent and appropriate response to all complaints, log them properly and respond with prompt action where the complaint is valid and requires action. Formal complaints need to be handled in the proper manner and follow a set procedure. Regular review of the complaints log will allow recurring issues to be identified and any appropriate preventative action implemented.

Alongside the complaints log, it is useful to maintain a record of compliments as well, as this gives a more accurate reflection of the balance of public opinion on certain issues, as well as providing positive feedback to staff and volunteers.

Updated August 2019

Since the commencement of the business plan a formal complaint logging procedure has been adopted and a number of internal policies updated. These include a new Safeguarding policy and Grievance procedure, as well as protocols for dealing with persistent and vexatious complainants.

#### 4.3.6 Risk Register

As a charity it is critical that MHT maintains a Risk Management Register that identifies and classifies the key risks in all operational areas of the organisation. Such a register is currently produced as part of the annual audit and end-of-year accounts process. However, risks can appear and disappear, or their level change at any time. It is important therefore that the Risk Register is regularly monitored by staff and the Board, to ensure that any high risk factors are identified and highlighted as early as possible and that appropriate contingency plans are made in a timely fashion.

Updated August 2019

As a charity it is critical that MHC maintains a Risk Management Register that identifies and classifies the key risks in all operational areas of the organisation.

The register has been adopted and was updated each of the last two years. It sits alongside the annual account reporting procedure and provides a regular thorough review, keeping staff and Board members properly informed of the risks the organisation faces.

Required Actions	Target By 2021
Review the policy on responding to planning applications	The ability to promptly identify planning applications which might have an impact on the land under MHT jurisdiction and provide comments in a timely fashion. The ability to communicate clearly to the public the circumstances under which we will comment on planning applications.
Undertake an Environmental Performance review of the organisations	A quantified documentation of the E.P. of the organisation exists and we have taken steps to improve our E.P. Any relevant policies have been updated and the results fed into the scoping study for future building developments.
Complete current archiving project, extend to cover other documentation and records, and put all digital records into new filing system	The archiving of historical records has been completed with all areas indexed and cross referenced. Digital records are maintained in an orderly way using a standard searchable system. Data relating to land holdings is available on the GIS system
Establish and maintain Incident Recording system	An accurate record of incidents exists and patterns in behaviour / type are identifiable
Create system for recording complaints, comments, and compliments and tracking progress	An accurate record of complaints if maintained, together with responses take and repeat issues are identifiable and addressed
Regularly monitor items on the Risk Management Register and take appropriate action.	Staff and Board are regularly appraised of current risks to the organisation and contingency plans are prepared in a timely manner

## 4.4 Administration and Processes

Underlying the effectiveness of MHT's day-to-day operation is the efficiency of its administration systems. Much of this is carried out by staff using various forms of IT, and actions needed to keep these current are already covered (See section 2.5). There are however additional upgrades of administrative processes and equipment that are needed in the coming 5 year period.

### 4.4.1 Equipment upgrades

There is a need to replace existing cash counting machinery to accommodate the planned change to £1 coinage due in March 2017.

Similarly, there is a need to update the existing postal franking machine to maintain reliability and compatibility with current standards

Each year many hundreds of car parking permits are issued over the counter by administration staff at Manor House but without a card payment option. A card payment facility will allow quicker more secure payment, reduce cash handling by staff and allow telephone payment of fines.

Updated August 2019

The two equipment upgrades – replacement of cash counting machine and the postal franking machines were completed.

Card payment facility has been introduced at the public counter, greatly improving transactions for parking permits as well as other direct payments from the public.

Required Actions	Target By 2021
Replace cash counting machinery.	Machinery in use is up to date and compatible with all coinage.
Upgrade postal franking system	Equipment is to current standards, reliable and cost effective
Install card payment facilities to Admin Office	Card payments can be taken over the counter for parking permits, fines and other payments.