

Shropshire Hills AONB Trust

Business Plan: March 2019 - December 2021

1. Executive Summary

The Shropshire Hills AONB Trust is a charity dedicated to promoting the conservation of the natural beauty of the landscape. It supports activities which protect the wildlife and heritage of the Shropshire Hills area and encourages knowledge about the importance of doing so. An important aim is to make it possible for local people and organizations to become involved in caring for the countryside around them.

One of the key relationships of the Trust is with the Shropshire Hills AONB Partnership, the official organization established by Shropshire Council and Telford and Wrekin Council to prepare and deliver the management plan for this designated Area of Outstanding Natural Beauty. The Trust has developed a mutually beneficial way of working with the Partnership. In particular the Trust helps the Partnership in recruiting Friends of the Shropshire Hills and the Partnership supports the Trust in the administration of the Conservation Fund which directly funds conservation projects.

The Business Plan sets out the Trust's long term vision statement and a mission statement which describes its general approach to fulfilling that vision. In drawing up its more specific plans for the next three years the Trust has analysed its stakeholders – the people and organizations with which it will need to work or support – and has drawn up a priority list of objectives which will further its role as a charity. These key objectives fall into three categories: developing organizational capacity, fundraising, and co-operative working with other people and groups. It has also considered the risks to the achievement of its aims and the controls it needs to put in place to mitigate those risks.

2. Vision statement

The natural beauty of the Shropshire Hills is secured forever as a place where wildlife, people, landscape and heritage thrive in harmony.

3. Mission statement

We will inspire people, organizations and businesses to be active in supporting the Shropshire Hills Area of Outstanding Natural Beauty and in helping to secure its natural beauty for the future.

4. Legal Status and Main Services

The Trust is a Charitable Incorporated Organization that was registered with the Charity Commission on 21st July 2016 (registration number 1168432). The Trust works alongside the Shropshire Hills AONB Partnership for the benefit of the general public and the landscape of the Shropshire Hills.

4.1 Trustees

The Trust has a maximum of eight trustees serving for up to three consecutive two- or three-year terms. Four trustees are appointed by the Trust, three are nominated by the Shropshire Hills AONB Partnership, and one - the AONB Partnership Manager - sits *ex-officio*. Despite the differences in how they are selected and their terms of office, all trustees have the same obligations and equal voting rights. This governance structure was agreed before the Trust was created and was intended to provide a balance between appointed members and those with a link to the AONB Partnership. In this way, the Trust remains legally and functionally independent of the Partnership.

The Trustees include the following:

- Appointed trustees (3-year terms): Sue Cooper, Diane Lyle, Anthony Morgan (chairman), Alastair Warrington
- Nominated trustees (2-year terms): George Chancellor, Veronica Cossons, Joe Manifold
- Ex-officio (term limited by employment): Phil Holden

4.2 Formal objects

The Trust's formal objects are:

- To promote the conservation and enhancement of the natural beauty, landscape, wildlife and historic value of the Shropshire Hills AONB, for the benefit of the public.
- To advance understanding, education and awareness, in and around the AONB, of the natural beauty, landscape, wildlife and historic value of the Shropshire Hills AONB, for the benefit of the public.

4.3 Working arrangements

The Trust has a formal agreement with the Shropshire Hills AONB Partnership setting out how the two organizations will work together with particular regard to the Trust's main areas of work: the Shropshire Hills AONB Conservation Fund, the Friends of the Shropshire Hills, the Shropshire Shuttle Supporters Scheme, the Caering for Caradoc Hillfort Appeal, and the National Lottery Resilient Heritage grant.

The Trust has overall responsibility for the Conservation Fund which provides annual grants to local groups and organizations undertaking projects in the AONB. The aims of the Fund are to encourage active involvement in conservation and so to spread understanding of the value of the local landscape, its heritage and its biodiversity. Partnership staff act as key points of contact and support the preparation and administration of grant applications and implementation.

In the financial year (2018 - 2019) the Trust supported 16 projects through the Conservation Fund with grants of between £600 and £3,000. These included: preserving wildflowers in roadside verges; providing woodland management training; supporting outdoor activities for young people; and surveying and controlling invasive plant species.

The Friends of the Shropshire Hills scheme was launched in 2008 and is now administered jointly by the Trust and the AONB Partnership staff. Annual subscriptions are paid to the Trust and Partnership

staff collaborate in the development and promotion of scheme and in setting indicative subscription fees.

The Trust also receives donations from the Shropshire Shuttle Supporters scheme and the Caering for Caradoc Hillfort Appeal. The use of such donations is restricted for these specific purposes.

The Trust benefited from a two-year National Lottery Resilient Heritage grant (2018 - 2019 and 2019 - 2020) which was awarded jointly to the Trust and to the AONB Partnership with Shropshire Council as the accountable body. The purpose of the grant is to support the organizational growth and development of the Trust and the Partnership and their effective joint working.

4.4 Finance

The Trust's income comes from donations: individuals, including subscriptions from the Friends' scheme; businesses; and charitable bodies. In the financial year to the end of March 2018, the Trust's income amounted to £28,609 with the majority from two Shropshire-based charitable organisations. As the largest of these has ceased operating, additional sources of income will be essential if the Trust is to maintain, let alone expand, its income and activities.

In the financial year 2017 - 2018 subscriptions from 120 Friends of the Shropshire Hills AONB scheme, totalled a little more than £2,400 or almost 10 per cent of the Trust's annual income. Income from the Friends is increasing through a combination of growing membership, annual cash payments, standing orders and, most recently, direct debits.

The majority of the Trust's income is used to fund projects in the AONB. In the financial year 2017 - 2018, slightly more than £21,500 or 76 per cent of the total income was disbursed through Conservation Fund grants, with the majority of the balance or 23 per cent retained in reserves. The Partnership staff currently provide administrative support free of charge which enables the Trust to keep operating costs at just 1 per cent.

4.5 Impact

The Trust has made a strong start in creating an independent but supportive governance structure and has worked well with the Shropshire Hills AONB Partnership staff. It has provided significant financial support to the Conservation Fund and is increasingly engaged in taking responsibility for the management of the Fund. The Trust has also been active in supporting the Friends of Shropshire Hills scheme and in the recruitment of additional Friends. However it faces a more difficult task in establishing its own public identity whilst at the same time promoting joint activities with the AONB Partnership

5. Operational Plan

5.1 People, businesses and charitable organisations

The Trust's primary work involves creating, building and maintaining relationships with individuals, businesses and organisations to raise funds, to build knowledge and understanding of the value of the Shropshire Hills AONB, and to cooperate and collaborate with organisations that share the Trust's vision and mission. The Trust is developing different approaches to its key stakeholders as outlined in Table 1.

Table 1: Stakeholder engagement

Stakeholder group	Nature of relationship	Nature of engagement	Planned
Individuals	Recipients of information on Shropshire Hills, potential Friends and volunteers	Newsletter, contact list, E-mail newsletter, events, feedback	Increased engagement planned for year 2 and 3
Friends of Shropshire Hills AONB	Supporters and Trust champions	Friends' group, E-mail newsletter, events	Training and capacity building for increased effectiveness. Life membership and legacy schemes
Volunteers	The Trust's front-line 'workers' including fund-raisers	E-mail newsletter, events	Volunteer's group Training and capacity building for increased effectiveness. Practical support to recipients of the Conservation Fund
Local businesses	Financial support to the Trust	E-mail newsletter, events, personal contact	Local business group
Charitable bodies	Financial support to the Trust	Grant applications, progress reports, E-mail newsletter, events	Charity group Analysis of potential future donors and relationship building
Shropshire Hills AONB Partnership	Shared vision for Shropshire Hills AONB	Shared Trustees and mutual support including the Partnership staff	Memorandum of understanding On-going
Other organisations operating in the Shropshire Hills AONB	Shared vision for Shropshire Hills	Casual/informal Trustees' links	Increased engagement in year 2 and 3
Community groups	Recipients of Conservation Fund	Through grants and project	Deepening links with high performing groups

5.2 Key objectives and actions for the next three years

The objectives and actions to December 2021 reflect the people, businesses and charitable organisation which the Trust regards as its key stakeholders.

1. Capacity development

- a. Increase the number of Friends to 200 and introduce a Life Membership and legacy schemes
- b. Recruit and train 25 active volunteers to be the Trust's front-line workers including fundraising
- c. Carry out a reasoned assessment of the advantages of increasing the number of trustees

2. Fundraising

- a. Establish two new sub-groups: businesses and charitable organizations
- b. Raise at least £40,000/ year for the Conservation Fund including at least 50 per cent from new sources by April 2021

3. Co-operation

- a. Ensure all policies and procedures necessary for charitable incorporated organisations are in place
- b. Clarify and streamline ways of working with the Partnership staff
- c. Trial mutually beneficial ways of working with Caring for God's Acre, Shropshire Hills Discovery Centre and Shropshire Wildlife Trust

The Trust will review the delivery of the business plan annually and share the findings with the Partnership. The Trust will also develop other ways of communicating progress through the Communication Strategy which will be developed later in 2019.

5.3 Risk

As part of the business planning process, the Trustees carried out a detailed assessment of the risks to its operation and identified ways in which these risks will be managed. The key findings are presented in Table 2.

Table 2: Risks and risk management

Category	Likelihood	Impact	Score	Management
Governance				
- Failure to achieve objectives	Medium	High	6	- Ensure adequate capacity through delivery of the capacity development objective
- Loss of Trustees	Medium	High	6	- Implementation of the business plan
- Trustees lack skills	Low	High	3	- More trustees to be appointed
				- Staggered recruitment approach useful
				- Ensure trustees are not overloaded
				- Volunteer scheme is a route to new trustees
Operational				
- Loss of administrative support	Low	High	6	- Confirmation of agreed ways of working
- Inadequate supervision of funded projects	Low	High	6	- Review of internal audit procedures and annual compliance note to Trustees
Financial				
- Inadequate income	High	High	9	- Planned focus on fundraising
				- Launch of Business and Charitable Organisation sub-Groups
- Inadequate financial controls	Low	High	6	- Quarterly financial reviews and reports
				- Undertake a review of financial procedures
External				
- Lack of co-operation from other organisations operating in the Shropshire Hills AONB	High	High	9	- Emphasise unique selling point: enhancing local natural beauty by small-scale interventions through community groups
- Change of AONB governance structure	Medium	Medium	4	