



## EXECUTIVE PLAN

**2014 / 15**

Ein hafan, lle cyn dyrchafu, lle gwylt,  
lle gwar i ddadebru,  
ddoe'n drysor ac yfory'n  
anturus lys i'r holl lu.

*(Geraint Morgan)*

Turn to our haven to come alive,  
A wild but welcoming place to revive,  
Venture to marvel and feast your eyes  
On our once and future paradise

*(Em Prof Prys Morgan)*

***This is a living document***

# **The Penllergare Trust: Developing the Executive Plan**

Where we are now, where we're going and how we're going to get there...

## **Mission Statement**

To protect, conserve, restore and maintain the cultural landscape of Penllergare for the present and future benefit and enjoyment of the public; also to promote the appreciation and knowledge of Penllergare, together with the protection and conservation of the wildlife and their habitats.

## **Vision Statement**

For the cultural landscape of Penllergare to be cherished by the nation, cared for by local communities and for Valley Woods and associated land and buildings to be enjoyed by everyone who visits, fulfilling a diverse range of cultural, social, economic and environmental needs.

## **Core Values**

Community Driven . Our local community is at the heart of everything we do

Inspire . We want to inspire everyone to learn more about Penllergare

One Penllergare . We are all striving towards the same goal and represent the same brand

Believe . We think big and we are not put off by the challenge of our ambition

## **Strategic Aims**

- To secure in long term protective ownership Penllergare Valley Woods, including the Walled Gardens and the settings of these areas.
- To establish a financially sustainable management regime that promotes public benefit and the conservation of Penllergare Valley Woods including the Walled Gardens and the settings of these areas as a safe and enjoyable place to visit.
- To restore as much of the historic designed landscape as is practicable.
- To protect and enhance the wildlife and natural value of Valley Woods including the Walled Gardens and the settings of these areas.
- To ensure that volunteering and community involvement are at the heart of the Trust and all its activities.
- To promote knowledge and understanding of Penllergare through educational, training and other community activities.

## **Current Core Responsibilities and Business Considerations (June 2014)**

- Management of 260 acres of historic and high scenic quality land in an area of high resident population with heavy public access . there are unavoidable responsibilities in terms of compliance with relevant legislation, safety, and meeting the expectations of people (local communities and visitors). We need sound and consistent operational management practices . not just on the ground, but also in our management systems and procedures. Projects can be distracting from this essential work, but they can also be part of the solution!
- Paying an annual rent of £25,000
- Estimated annual revenue requirement of £100,000 (inclusive of the rent). Current annual revenue generation is approx. £35,000.
- Ambitious further development plans e.g. the walled gardens and associated land.
- Commitment (legal requirement in s106 agreement) to free public access on foot.

## **Key questions to help guide the way**

- To what extent do we continue to rely on grants and other sources of one-off funding to meet our core responsibilities?
- How bold and enterprising should we be in generating revenue? How strong is our social conscience?!?
- To what extent do we want, and for how long can we rely on, volunteers to meet our core responsibilities, including overall management?

# EXECUTIVE PLAN 2014/15

In 2014/15, the Penllergare Trust has agreed that the overriding strategic priority will be:

## **To develop the Trust as a sustainable organisation – essentially developing the support and money to deliver our purposes.**

In order to achieve this, the Penllergare Trust will:

- **develop a clearer and stronger organisational structure and culture** in order to build a strong dynamic team . together as Trustees, volunteers, staff and supporters . that cohesively supports and promotes the vision, aims and objectives of the Penllergare Trust. A team that is ready to work together and support each other to deliver on the strategic priorities for a sustainable future. A team that is proud to represent the Penllergare Trust in regenerating Penllergare Valley Woods for everyone to enjoy.
- **Review and rewrite the 10 year integrated management, maintenance and business plan with a priority on supporter development.** Short term priorities:
  - develop and actively implement a business, fundraising and marketing plan. This will include better understanding of our audiences / beneficiaries and position within the market, enhancing the visitor experience, developing the recruitment, development and retention of volunteers, subscribing members, Friends, active spenders/loyal customers and donors and more.
  - develop and actively implement a landscape management plan. This will include better understanding of the Conservation Management Plan, Glastir woodland management plan etc.
- **put in place robust systems, policies and procedures to meet the challenges of daily operations**
- **review the remainder of the HLF Parks for People project** to ensure resources are targeted effectively to support the overriding strategic priority, compatible with the Approved Purposes.
- be bold, take risks and **invest time and money in applying for the following development projects** (in no particular order):
  - Preparing and submitting a grant application to the Heritage Lottery Fund under its Heritage Grant programme . for phase 2 landscape restoration including the Walled Gardens.
  - Preparing and submitting a grant application to the Big Lottery Fund under the People and Places programme . in brief this is about consolidating our operating position especially around volunteering and community involvement.

## **Actions**

### **Develop a clearer and stronger organisational structure and culture**

- Define the role of the executive group, individual roles and responsibilities in the context of the organisational structure as a whole. Differentiate between Governance, Executive Management and Operations.
- Define internal communication/decision-making processes.
- Propose future Trustee, staff and volunteer roles and responsibilities post-March 2015
- Improve awareness and acknowledgement of the mission and vision statements at all levels of the organisation. Identify core organisational values.
- What kind of an organisation do we want to be portrayed as? Develop brand guidelines for the Penllergare Trust and the promotion of Valley Woods and ensure that this is proudly communicated consistently in everything that we do.

**Rewrite and review the 10 year integrated management, maintenance and business plan with a priority on supporter development.** Short term priorities:

**Develop and actively implement a business, fundraising and marketing plan – linked to a strong landscape management plan**

- Review the recommendations of the fundraising consultants in order to:
  - Create a strong case for support . short term and long term
  - Review and develop current and potential business opportunities and partnerships
  - Review and develop our fundraising capacity for practical implementation
  - Review and develop our marketing and communications opportunities in line with the Penllergare brand.
  - Develop and actively implement a business, fundraising and marketing plan

Key actions for 2014/15 include:

- Carry out intensive and coordinated market research to better understand our audiences / supporters (and what they want) and ensure that we are well-positioned in the market.
- Implement and review the findings of the latest local community consultation regarding future projects.
- Invest in volunteering. Improve management, motivation and development of volunteers.
- Prioritise the review, development and promotion of the Friends of Penllergare in becoming a stronger supporter and membership group
- Design and publish a new community and visitor focused website that reflects our brand and offering linked to an e-commerce system and supporter database.
- Establish a strong and profitable visitor offer in and from the new coffee shop.
- Enhance the visitor experience at all levels . provide more opportunities for visitors to learn and spread the word about Valley Woods (its history, wildlife and community spirit) and to donate/become a member/become a volunteer.
- Develop a programme of public events for 2015. Review and develop private bookings and community involvement opportunities in terms of volunteering, fundraising, events and training. Establish a pricing structure for all event-related enquiries.

**Develop and actively implement a landscape management plan - linked to a strong business, fundraising and marketing plan**

**Put in place robust systems, policies and procedures and ensure a strong focus on effective operational management**

- Review all systems, policies and procedures and ensure that they are implemented effectively and efficiently by all (including archives and IT)
- Review internal and external communications systems including signage and site interpretation
- Consider future administration challenges and solutions
- Develop plans for a long term operational base for staff and volunteers

**Review the remainder of the HLF Parks for People project**

- ensure resources are targeted effectively to support the overriding strategic priority, compatible with the Approved Purposes.

**Invest time in applying for the following development projects (in no particular order):**

- Preparing and submitting a grant application to the Heritage Lottery Fund under its Heritage Grant programme . for phase 2 landscape restoration including the Walled Gardens.
- Preparing and submitting a grant application to the Big Lottery Fund under the People and Places programme . in brief this is about consolidating and developing our operating position especially around volunteering and community involvement

