

Business Plan 2022 to 2027

Adopted March 2022



Malvern Hills Trust

This page is intentionally left blank

Executive Summary

Our Mission

To protect and manage the iconic Malvern Hills and Commons on behalf of the nation.

Our Vision

The Malvern Hills and Commons are a stunning, unique and inspiring landscape that is enjoyed and respected by everyone in harmony with rich and flourishing wildlife, natural and cultural heritage.

An overview of the Business Plan

This plan lays out the principal objectives of Malvern Hills Trust (MHT) for the coming five year period and beyond. It recognises the current strengths and weaknesses of the organisation, as well as the opportunities and threats that it is anticipated we will face over that period, and sets our target goals for delivering those objectives.

The result is a comprehensive programme of works to maintain and improve our core work areas, while also addressing those future challenges which have been identified that the organisation will face. Not every future challenge is foreseeable, as the recent Covid pandemic has so graphically demonstrated, so the plan also includes steps to build the organisation's resilience and flexibility, so as to be able to better meet those future unknowns.

Key Challenges in the future

The plan identifies eight key areas of challenge that the Trust will need to face in the coming years, issues that are likely to have the most significant impact on how the organisation will deliver its objectives.

- Responding to economic change. With rising interest rates and inflation on the horizon, financial pressures on the Trust, and the funding resources available to deliver its work, is expected to increase.
- Social demands on the land under the Trust's care is changing, with the significant increases in visitor numbers experienced over the last few years expected to continue. Future management of the land will need to reflect and accommodate that increasing demand.
- Climate change and the need for greater environmental sustainability means the charity needs to adapt its operational methods and the management of its land, to both mitigate threats posed by climate change, and to protect against loss of biodiversity.
- Tree diseases, in particular Ash Dieback Disease, pose a significant threat to the natural aspect of the Hills and to the safety of the public. Ash woodland covers nearly

12 % of Trust land and management of the disease in the coming years will put major demands on resources – both financial and staff time.

- Updating the Acts - the documents that set out the organisation's governance and powers – is a major step that needs to be taken forward in the life of the plan. Doing so it would better equip the Trust, allow it to manage its land more effectively, and give it the flexibility to diversify its income generation to deliver that enhanced land management.
- Fundraising and grants currently provide essential funds to many of the Trust's project works. If all the aspirations of the next five years are to be achieved, a step change in the level of grant and general fundraising income needs to be achieved.
- New agri-environment schemes are currently due to launch in 2024. These are key components in how the charity funds much of its more specific habitat management. The new scheme has the potential to significantly enhance the Trust's delivery of positive habitat management, but as yet considerable uncertainty exists over the details of how they will work in practice.
- Contingency planning, to better equip and prepare the organisation in the case of major events is to be raised to a higher level. Having the organisation and flexibility so it can respond nimbly to unexpected and unwelcome changes in the future.

Monitoring the delivery of the plan

Monitoring progress in the delivery of this plan, and measuring its success against the targets that have been set, will be undertaken in a number of ways:

- Projects scheduled to be undertaken each year will be set out in the Project Progress Reports. These will be reported on at each meeting of the Finance Administration and Resources Committee (FAR) and Land Management Committee (LMC). to enable progress to be monitored by the Board
- Each year there will be an interim assessment of the Plan's progress and review of the targets, to be reported to Board as well as summarised in the publicly available Annual Review.
- In year three, at the time when any changes to the governance may be expected to be completed, the full plan will be reviewed to take into account any changes that in progress at that stage.
- The plan will be fully reviewed at the end of the 5 year period, with its performance against all targets evaluated.

Compilation of the plan has taken many months, with input provided from both trustees and staff. It represents and documents the aspirations for the organisation for the next five years, and presents, as at the time of writing, the best estimate on how the Trust might grow in that period.

Contents

PART 1	Introduction	7
	About the Business Plan	7
	About the Malvern Hills Trust	8
	Opportunities and challenges in the next 5 years	10
	Responding to economic changes	10
	Changing social demands	10
	Climate change and environmental sustainability	11
	Tree diseases	12
	Updating the Acts	12
	Fundraising and grants	13
	Adapting to new agri-environment schemes	13
	Contingency planning	14
	Current context – Constraints, limitations and risks	15
	Our assets and resources	15
	Our duties and legal obligations	17
	Constraints	18
	Risks	20
PART 2	Delivering our core objectives	23
	Land management	24
	Resources	31
	Communications	46
	Organisation and infrastructure	56
PART 3	Appendices	65
	1 - The Five Year Work Plan	66
	2 - The Five Year Financial Forecast	80
	3 - Committee and Trustee structure	86
	4 - Current staff structure, proposed staff structure	87
	5 - Constraints: List of relevant legislation	89
	6 - SWOT analysis	91
	7 - Vehicle and machinery replacement schedule	94

Glossary of terms and abbreviations

ADD	Ash Dieback disease
AONB	Area of Outstanding Natural Beauty
the Acts	Five Malvern Hills Acts dated: 1884, 1909, 1924, 1930 & 1995
ELMS	Environmental Land Management Scheme
FAR	Finance, Administration and Resources Committee
GDPR	General Data Protection Regulations
the Hills	Land under the jurisdiction of the Malvern Hills Trust
the Hills and Commons	Land under the jurisdiction of the Malvern Hills Trust
LGPS	Local Government Pension Scheme
LMC	Land Management Committee
LMP	Land Management Plan 2021 - 2026
MHT	Malvern Hills Trust
NVC	National Vegetation Classification System
the Plan	The Business Plan 2022 - 2027
RMS	Risk Management Schedule
RPA	Rural Payments Agency
SSSI	Site of Special Scientific Interest
SWDP	South Worcestershire Development Plan
SWOT	Strengths, Weaknesses, Opportunities, Threats
WCC	Worcestershire County Council
WPF	Worcestershire Pension Fund

PART 1 – Introduction

About the Business Plan

This plan sets out to achieve three main purposes:

- To identify the main issues that the charity might face over the coming 5-year period, (and in some cases, the longer term)
- To identify what resources are currently available to us, what additional resources will be needed and how to meet the anticipated challenges
- To set out a timetable and plan of how our organisation needs to develop in order to deliver the objectives of the charity as well as meeting anticipated future demands

The plan aims to provide a roadmap enabling us to:

- Take a strategic approach, ensuring that resources are focused on activities which will help the Trust to deliver its objectives
- Take timely actions to meet future challenges
- Maintain an economically sustainable structure to enable the Trust to deliver its objectives within its financial capacity.

The Business Plan (the Plan) is separate from, but complementary to, the [Land Management Plan 2021-2026](#) (LMP). While the LMP sets out the practical work required to conserve, maintain, and enhance the Hills and Commons, 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. The Plan is a live document that will be updated continually as new information comes to light. Core to the Plan is the anticipation that the organisation will need to grow and develop from its current size and structure to meet the future demands and pressures on the landscape it cares for.

All the activities in the Plan must be viewed in the context of the [Malvern Hills Acts](#). As a registered charity established under statute, the Trust's activities and operations are strictly directed and limited by the duties and powers set out in these Acts.

Maintaining flexibility and resilience

As graphically demonstrated during the Covid pandemic, there are three key principles that have been considered during the preparation of this document.

- No business plan, strategy or forward projection can predict every single factor that might have an impact on future work - it is always possible that some major unforeseen event will occur that significantly changes the timescales or priority of any plan.

- To cope with such eventualities MHT needs to retain a significant degree of flexibility in its approach. There is a need to regularly revisit and reappraise plans in the light of changing circumstances.
- The proven importance of maintaining adequate and robust reserves within the organisation. Those reserves are primarily financial, but also include staff and volunteer capacity, as well as other resources.

About the Malvern Hills Trust

Malvern Hills Trust (the working name of Malvern Hills Conservators) was established by statute in 1884 to protect the Hills and Commons of Malvern and to secure public access. The Trust has always had charitable objectives and was registered as a charity in 1984. The Trust's powers and duties are set out in the five Malvern Hills Acts, dated 1884, 1909, 1924, 1930 and 1995 and the Trust is required to manage the Hills and Commons 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

Additionally, the Trust is required to conserve and enhance biodiversity, Sites of Special Scientific Interest and Scheduled Monuments on its land.

The Trust is controlled by 29 Trustees who are elected or nominated onto the Board. It is the Board of Trustees that is legally responsible for and sets the strategic direction of the organisation.

The Trust has over 1,130 hectares (2792 acres) of [land under its jurisdiction](#); most of which it owns. The majority (90%) is registered common land and therefore subject to the Commons Act. The land is a rich mosaic of open grasslands, ancient and secondary woodland, scrub, ponds, road verges and disused quarries. 86% of the MHT land is within the Malvern Hills Area of Outstanding Natural Beauty (AONB) and is thus recognised as being of national importance.

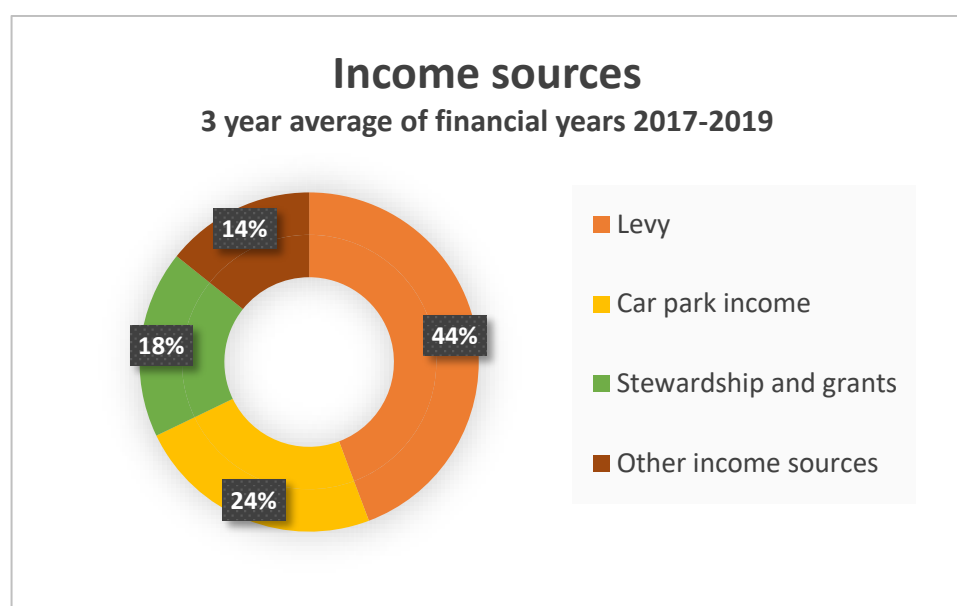
The Hills and Commons are one of the region's largest, continuous areas of semi-natural habitat. This supports a rich array of wildlife from species and habitats typical of middle-England to rare, nationally important flora and fauna. 62% of the land managed by the Trust is designated as Sites of Special Scientific Interest (SSSI). The geological exposures of the Hills, ancient woodlands, acid grasslands and mire habitats are all of national importance. As owners of land with SSSI status, the Trust is required by law to ensure that the conservation interest of the land is maintained or enhanced.

There are three Scheduled Monuments and three Listed Structures on the Trusts land. The Trust's Land Management Plan gives further detail on these features and their particular management.

The Hills are a very popular area of public open space, with a national identity, receiving well over a million visits per year from a wide variety of recreational visitors, from walkers and cyclists to hang gliders and rock climbers. The area includes over 100 kilometres of footpath, 16 public car parks and panoramic views across three counties. The Trust has the power to make byelaws to ensure the responsible use of land by visitors, neighbours and other third parties.

Over the years, the area of land MHT cares for has steadily increased through new purchases or gifts of land - from 650 hectares (1608 acres) in 1931 to become 1,130 hectares (2792 acres) today. There has also been an increase in public use of that land, driven by social changes such as increased mobility, increased population and an expansion of recreational activities, which together have led to increased pressures on the land. To cope with those changes and to continue to deliver the core objectives, the structure and functions of the organisation have had to evolve and expand over the years.

The Trust's current income is on average approximately £1 million per annum. In recent years approximately 44 % of that income derived has from a levy on the Council Taxpayers living in certain wards and parishes in the area, while a further 42 % is provided by two other major income streams - car parking fees and agri-environment grants. The remainder comes from donations, rents and other minor income streams.



(2020/21 year data excluded due to abnormal impacts of Covid on car parking and RPA payment delays)

Budgets are set annually and detailed monthly management accounts are provided for trustees.

The Trust has an Accounting Policies manual which set out areas of responsibility for financial management and internal processes. The Trust's accounts which are prepared in accordance with the Charity Commission's Statement of Recommended Practice are subject to an annual external audit, and have received unqualified reports for the past 5 years.

Meeting the challenges and opportunities of the next 5 years

Managing and protecting the landscape under our care is the foundation stone of the Trust's aims for the coming 5 years, and it is a core function that we need to deliver every day of the year.

However, in addition there are 8 critical areas of change that the Trust will need to address in the lifetime of this plan. They present both significant opportunities and challenges for our organisation and consequently shape how the organisation's future operation will be implemented. Those 8 areas are highlighted below together with specific actions identified to address them.

a) Responding to economic changes

The economic outlook for the next 5 years is much more uncertain than it has been in the past decade. Global markets re-emerging from lockdown restrictions have generated unsatisfied demand that is fuelling price inflation across a range of sectors, and in the UK these come in tandem with the uncertainties of a post-Brexit economy. Fuel, transport, material and employment costs have already seen dramatic rises well above those seen in the previous decade and inflation forecasts are continually being revised upwards.

Whilst post-Covid growth in economic activity is anticipated to continue, there still remain significant uncertainties over possible reintroductions of restrictions, and this combined with significant inflation increases means the Trust needs to be vigilant in its financial planning.

In order for the Trust to meet and mitigate these uncertainties we need to:

- budget for more unstable economic times, with higher anticipated levels of inflation for 2022 and beyond, (3- 5 % or above)
- closely manage and control costs within budgets
- generate more income from a wider diversity of income streams
- take measures to enhance the retention and recruitment of future staff from a smaller, more competitive labour market pool

b) Changing social demands

Since its formation a key object of the Trust, as laid out in its Acts, has been to keep *the Hills open, unenclosed and unbuilt on as open spaces for the recreation and enjoyment of the public*. The land we care for is open to public access for 365 days of the year.

Recently there have been significant changes in the level of social demand and use of this land. Driven initially by the release from Covid lockdown restrictions, visitor numbers have dramatically increased, rising at times to more than double the pre-2020 levels. Along with number increases there have also been changes in the distribution of users, with previously quiet areas of the hills becoming busier, and the mix of user types has also changed as evidenced by higher levels of dog ownership and cycle use (both manual and e-bike) while horse-rider use has diminished on some parts. This changing pattern of social use of the Hills is expected to continue in the years to come – driven by heightened

social demand for public outdoor spaces, population increases in the surrounding areas and population shift away from urban areas.

There are consequences to these higher visitor levels: pathway erosion has increased, particularly on the main ridgeline, byelaw breaches and traffic congestion (both within car parks and unauthorised parking) have gone up, and there are increased reports of littering and friction between user groups. Additionally, there is greater disturbance to the quieter areas which provide refuge for wildlife, and erosion to the scheduled features.

To address these changes in social use of our land, measures are included in this plan to:

- carry out works to restore eroded parts of the path network, and develop new and increased protective measures
- undertake works to repair areas damaged by vehicles and persistent unauthorised parking
- carry out campaigns to educate key user groups on how to access and use Trust land without damage

c) Meeting climate change and environmental sustainability targets

Both the global climate and ecological emergencies are widely acknowledged to pose significant threats to all life on our planet. More specifically they will have a significant impact on the land under the care and management of the Trust – with loss of species and habitats, increased severe weather events leading to flooding and erosion and increased pressure on land use and resources.

Alongside the direct impacts these two global emergencies pose to the Trust's estate, there are also the indirect challenges the Trust will need to meet - as an increasing number of new regulations and conditions are introduced by Government in response to the need to change societal behaviour.

The Trust has a responsibility to meet all of these challenges, to adapt its systems and ways of working to reduce its own carbon emissions and thereby contribute to a sustainable future, and to ensure it can effectively operate within future regulations and controls.

Measures to address this area included in the plan include:

- undertaking a full audit of the Trust's carbon emissions
- developing a full environmental sustainability plan, to identify and prioritise all those steps and measures that the organisation needs to take.
- whenever equipment and systems are to be updated or acquired, proper evaluation of low carbon options will be undertaken so that wherever feasible low or zero emission systems of working can be adopted.
- where possible installing appropriate carbon and energy saving measures as well as adding energy-generating systems to Trust buildings.

d) Tackling tree diseases

In recent years there has been extensive spread of several tree pathogens within the UK tree population. Of these, the most significant are *Phytophthora ramorum* which attacks larch as well as other woody species, and *Hymenocyphus fraxineus* - Ash Dieback disease (ADD). With parts of the Hills holding significant numbers of ash trees, ADD poses the biggest potential impact for the Trust in terms of numbers of trees it will affect, the effect their loss will have on the landscape, and the financial implications of felling diseased trees.

Currently it is estimated that measures needed to address ADD will require £340k of arboricultural contractor works over the five years of the plan, in addition to work which can be carried out by Trust staff. A dedicated fund has already been established to support these costs, and the first year of works is underway. That workload is expected to increase year on year as the disease takes hold and more trees degrade to a poor condition.

Measures are therefore included in this Business Plan to:

- increase income to meet the cost of managing tree-diseases - through making best use of available grants and promoting donations and gifts towards tree work, as well as for restorative tree-planting projects.
- regularly review the spread of the disease and update projected cost accordingly
- undertake regular inspections of all trees in high-risk locations so as to manage the risks to people and property posed by the disease.

e) Updating the Trust's governing Acts

As a 'creature of statute' the Trust is limited in what it can and cannot do by the Malvern Hills Acts that set out its duties and powers. Those Acts endow it with many positive powers and capabilities, but also set limits on the ways in which the organisation can operate and develop. With each passing year the Acts become more outdated, the powers increasingly susceptible to limitation by other legislation, while changes in society's use of the land brings with them new impacts never considered when the last Act was drawn up in 1995.

The Trust began a review of the Acts in 2014 with the aim of updating them and consolidating them into one coherent piece of legislation. Many of the proposed revisions to the Acts will enable the Trust to better deliver its key objectives as laid out in this plan, as well as meeting other future challenges. Examples include having more flexible powers for management of the land under our care, more effective governance, greater diversity in income streams (to better protect the organisation in the event of significant reduction in any of the current revenue streams), and flexibility to generate additional support which will enable us to deliver a greater range of positive outcomes for the hills.

Other steps the Trust will need to make in the near future, will include major adaptations such as installing electrical car charging points to the car parks, adding solar panels to buildings and implementing other low carbon initiatives. The Trust currently has no

express power to do any of these things so they are something that can only be changed through updating the Trust's governing Acts.

To update its governing Acts the Trust needs to:

- identify and allocate adequate finance, staff time and other resources to take forward the work on the new Act
- undertake effective communications with stakeholders throughout the process
- undertake a major review of the Business Plan in year 3 to reflect what progress has been made

Timing of this work is critical as there are many other elements of the workplan that are dependent on gaining wider powers. At the time of writing it is understood that, subject to both Board and Charity Commission approval, a private bill could be put forward to Parliament in November 2022 at the earliest, and may take two years or more before receiving Royal Assent.

The various actions planned within the 5 year Work Programme (Appendix 1, page 66) fall into two types – those that can be undertaken independently of any progress on a new Act of Parliament, and those that are dependent on it.

f) Increasing fundraising and grants

Whilst the cost of day-to-day management of the land under our care is expected to be covered by current income streams, many projects anticipated in the next 5 years will require specific funding. The Trust is fortunate in having healthy financial reserves, some of which can be applied to those projects, but particularly at a time of economic uncertainty, reserves must be maintained at prudent levels. Other important projects can only be achieved through grant support or general fundraising from other sources.

While there have been some recent successes in grant applications, additional fundraising will be needed if all the work we aspire to complete during the next 5 years is to be achieved without decreasing critical reserves. Key objectives will be to:

- increase our levels of general fundraising to support the wider work of the Trust to generate a minimum of £75,000 over 5 years
- seek out applicable grant schemes and obtain grant funding of £150,000 for specific projects over 5 years
- set aside additional reserves to ensure delivery of vital works such as dealing with tree diseases.

g) Adapting to new agri-environment schemes for land management

In March 2021 the Government published its outline plans for Environmental Land Management Schemes (ELMS) which will replace the current suite of Agri-environment support. These new schemes are aimed at supporting the rural economy whilst at the

same time delivering on the Government's 25 year Environment Plan, as well as the national commitments to achieve net zero carbon emissions by 2050.

The new ELM scheme will shift away from previous schemes (aimed primarily at supporting agricultural production and nature conservation) by supporting delivery of 6 core areas of the Government's Environmental Plan – clean water; clean air; thriving plants and animals; protection from environmental hazards; reduction of and adaptation to climate change; and enhancing beauty, heritage and engagement with the environment.

These new scheme targets fit well with the objects and duties of the Trust. It is anticipated they will provide valuable financial support for positive management of the Hills and Commons in the coming years.

The Trust will need to take every opportunity to input into their development to ensure their suitability in supporting the management of the Malvern Hills and Commons. This includes:

- closely monitoring development of the new schemes
- taking part in any applicable trial and pilot stages prior to first implementation in 2024
- assessing the applicability of any new scheme to the Trust land holding and applying to join wherever appropriate

h) Contingency planning

The impacts of the Covid 19 pandemic have affected almost every aspect of society since March 2020 and had major implications for the Trust's operations. Some of those effects have reduced since the early days of the pandemic, but with the advent of different variants, there still remains uncertainty about what the future holds.

The Trust needs to ensure it is appropriately prepared for the future, both for the currently developing post-pandemic circumstances (such as impacts on staff availability due to high infection rates, or potential imposition of further government restrictions) as well as to cope with other large scale events that might arise in the coming years. These may come in the form of changes to energy supplies, increased biosecurity or public health threats, shifts in social uses of the hills or wider scale conflicts, contractor and supply chain issues.

To meet this area of challenge the Trust needs to build its resilience and contingency arrangements. In doing so we will need to:

- regularly update our risk management procedures and systems of work to deal with Covid impacts, both on staff and visitors
- regularly review the level of financial reserves as well as non-financial resource capacity within the organisation
- ensure we have appropriate flexibility within the organisation to adapt to fast moving changes.

Current context - Constraints, limitations and risk

In setting out the future work and how we will deal with the major challenges and opportunities we may face in the coming years consideration has also been given to all those other factors that bear on the organisation and how they might influence how we go about achieving the Trust's aims and objectives.

Some of these are constraints that come in the form of legal obligations and compliance requirements, others are simply limitations on the resources that are available to us – whether they be human, financial or physical resources. Others include the risks (large or small) that the organisation might face, now and in the future years.

The Trust's assets and resources

Land holding

A large area of the spine of the Hills and the Malvern Commons was placed under the Trust's jurisdiction by the 1884 and 1924 Acts. That area has been expanded by a long succession of donations and purchases, and at the start of 2022, the land holding totalled 1130 hectares. Six small parcels of land have been added in the past 4 years, most recently in 2021 with the purchase of another 2.5 hectares of meadow and woodland in Colwall.

Not all the land under its jurisdiction is owned by the Trust. Some areas were placed under the Trust's management and control by the Malvern Hills Acts but are still owned by other parties, with whom the Trust works in partnership whilst some other areas are leased to the Trust.

An up to date list of land holdings is published each year within the Trust's Annual report.

An additional area of woodland and meadow is expected to be transferred to the Trust in 2022, having been left to the charity as part of a donor's legacy.

Buildings

The Trust owns a number of buildings. These include its operational premises at Manor House, Top Shed and Lower Shed, along with a number of other buildings including St Ann's Well and agricultural buildings at the Hacketts and Brockhill Road. These provide a limited range of office and archive space, vehicle and machinery storage and livestock management space. However, in their current configuration they have very limited capacity for growth.

Vehicles, plant and machinery

Alongside the buildings, the Trust has a range of vehicles, plant and machinery which is used to help deliver the management of the land under its care. These, together with the knowledge base of the staff who operate them, are critical in enabling the organisation to deliver its core objects and effective management of the Hills. The acquisition of new plant and machinery along with the timely replacement of existing equipment, is carried out under an agreed replacement and procurement system.

Staff and Volunteers

The current staff structure is shown in Appendix 4 (page 87), with a total of 21 full and part time staff, (16.9 Full Time Equivalent employees) in three main teams – Operations, Conservation and Finance / Administration. Many of the staff have been with the organisation for more than 5 years and turnover of staff has generally been low.

Working alongside the staff, the Trust has number of regular volunteers engaging in activities such as conservation work, voluntary wardening, office support and surveying (see Appendix 4). These are in addition to the voluntary role the trustees play. There are over 100 regular contributors. Their work was severely curtailed by lockdown but most of the outdoor volunteers have returned since restrictions were lifted. However, continuing restrictions and the Trust's own risk assessment have meant that the much valued office support team have not been able to return and some recruitment may be required once more people can return to the office.

Knowledge capital

The Trust has a long and unusual history and this, coupled with a diverse land holding, a complex legal and governance structure and a high volume of public interaction, makes day-to-day management of the land holding far from straightforward. The Trust is fortunate in having a team of staff and volunteers who have a wide range of experience, skills and knowledge, and this coupled with comprehensive records and archive material enables efficient management of its land. Loss of long standing experienced individuals can have negative impacts on the collective knowledge of the charity and makes effective recruitment an essential requirement for a sustainable future.

Funds

The organisation greatly benefits from having the stable income-stream derived from the levy set up under the Malvern Hills Acts. Over the 3 years to 2019, this amounted an average of 44 % of the Trust's average annual £1m income. The other two key income streams which make up another 42 % of the total income – government agri-environment scheme grants and car park revenue - are demonstrably unpredictable. Whilst in most years they provide a regular level of income to the charity, the last 2 years have seen significant variability in both level and timing of receipts.

Gifts and legacies provide valuable additional funds, but are by their very nature unpredictable.

The Trust also holds a number of different categories of financial reserves (see Appendix 2, page 80). Those capital reserves which are held for specific restricted purposes (Land Purchase (1992) Fund, Parliamentary Fund and Lands Maintenance Fund) amounted to £1,716,438 on 31st March 2021. In addition, there are the unrestricted and designated funds, including the Gift Fund, amounting to £579,750 as at 31st March 2021.

Having a robust financial reserves policy together with regular monitoring to maintain levels at or above that reserve threshold, was critical in allowing the Trust to continue operating without major adverse effect during the early days of the Covid pandemic

Future projected balances for each of the funds the Trust holds are shown in the 5 year financial forecast in Appendix 2 (page 80).

Stakeholder groups

There is a wide range of individuals, groups and organisations who have an interest in the land which the Trust manages. These range from those with legal rights and duties that apply to our land, such as local commoners with rights to graze animals and the bodies which oversee protected landscapes, through to the many different types of recreational users. As well as the general public, individuals who simply want to walk or ride across the Trust's land as part of their day to day lives, these also include those special interest groups such as the hang gliding enthusiasts, and those with a particular focus such as the wildlife and geology charities.

All have an interest in how the Trust carries out its management of the Hills and the Trust has a number of forums to hear their voices – such as the Wildlife Panel, Recreational Advisory Panel and Castlemorton Common Coordinating Committee.

Partnership working

In order to achieve its aims of managing the landscape to an appropriate standard, the Trust often works in partnership with various stakeholder groups. These include those who have statutory or regulatory powers such as Natural England, Historic England, Local Authorities and utility providers. Others include the AONB, neighbouring landowners, recreational user groups, groups with specialist knowledge of wildlife, geology and history of the Hills and the volunteers who undertake work for the Trust.

Such partnership working is critical in helping the Trust to deliver many of its projects and work programmes and we are fortunate to have regular and positive liaison with so many partners and organisations.

The duties and legal obligations of the Trust

Alongside the delivery of its statutory duties, as set out in the introduction on page 8, the Trust also has obligations to comply with other relevant legislation that applies to its sphere of operations. This includes legislation such as the Wildlife & Countryside Act or the Ancient Monuments and Archaeological Areas Act, (both of which impose obligations on the Trust in relation to designated land, protected species and habitats and archaeological features). The Trust is also subject to all other general legislation which regulates its day to day activities. (eg in relation to health and safety, employment law, data protection, environmental and waste regulation, amongst others).

As well as delivering its statutory duties as set out in the Malvern Hills Acts, the other legal obligations the Trust has to comply with fall into the following broad groups:

- charity and other law which regulates the activities of bodies like the Trust
- environmental legislation that applies to the land under the Trust's care
- legislation or regulations relating to the Trust as an employment organisation
- other general legislation applicable to any individual or body within the UK

Such legislation and regulation dictate many aspects of how the Trust can operate in delivering its charitable objects. Failure to comply with them may result in legal liability,

prosecution and /or significant financial impacts though fines and other penalties. Non-compliance also risks the potential for high profile adverse media attention which would significantly damage the Trust's reputation.

A summary of the main legislation that applies to the Trust's work appears in Appendix 5, page 89.

Constraints

Many of the constraints that limit how the Trust might grow and develop can be overcome or mitigated against in the medium to long term. However, in the short term they have a direct impact of how the Trust operates and what growth may be possible in the coming 5 years.

Physical constraints

Office space

The capacity of Manor House limits how many staff and volunteers the organisation can accommodate at any one time. Minor changes to the building during the last few years have provided some additional capacity on the 2nd floor but the space and scope to accommodate additional staff or volunteers is limited.

- The meeting room is small and unsuitable for meetings of more than 6-8 people, particularly during the Covid pandemic. It is too small for larger committee meetings, particularly if members of the public also wish to attend. Ideally the Trust should have a space of its own large enough to hold meetings of its Board and committees with some public attendance.
- Public counter space is limited by the layout and footprint of the building and there is little space for more public educational or interpretative materials about the work that the Trust undertakes.
- Space for the secure archiving of Trust records is already full and as the volume of archive material continues to grow, there is need for additional capacity for storage. Archive material is frequently referenced at short notice so offsite storage is not ideal.

Top Shed

This building is the base for the Field Staff and key to the estate operations.

Improvements to welfare facilities and internal storage space have been made over the last 5 years. Additional external storage for materials (stone, timber, bulk items) is needed and some further rationalisation and expansion of the main shed is required if all the equipment is to be securely stored under cover.

Bottom Shed

The Trust does not have a secure, appropriately fitted out facility as a base for its conservation volunteers. The bottom shed has previously been identified as suitable location for this purpose. A substantial rebuild would be required to make a safe, effective and attractive volunteer base. This project is a high priority.

Financial constraints

Main income streams

A key constraint on the organisation, the Trust is currently heavily dependent on the three income streams of:

- the levy
- agri-environment Schemes
- car park revenues

The latter two are each vulnerable to change, whether from shifting government policy or changes in public use of the Trust's land – as evidenced both during the Foot and Mouth epidemic of 2002, and more recently during Covid 19 lock downs in 2020.

The potential capacity to increase income from these sources is limited. Any land eligible for Higher Level Stewardship or Countryside Stewardship has already been entered, and those areas that currently remain un-supported are unlikely to qualify for entry. It is possible eligibility criteria may change through the future ELM Scheme (see Opportunities, page 13) but with limited details available about these schemes at the current time, the future income from this source remains uncertain.

The ability to generate more car park income is limited by the space available. The capacity of some existing car parks is limited either by the physical layout of the sites, or because of the status of the adjoining land (e.g. SSSI) which precludes increasing those car parks outside their current footprint. Others do have potential for increasing capacity as identified in the work plan.

Car park charges are reviewed annually but there is limited scope for increasing car park charges.

The Covid pandemic triggered economic downturn of 2020 highlighted two key aspects of the Trust's financial position.

The first was that, while fortunate in having good unrestricted financial reserves during the worst phase of the pandemic, it should be recognised that the period of greatest financial stress was limited in duration. Had the car park closures continued at the same level for longer, the organisation would have exhausted its reserves within 12 -18 months.

Secondly it highlighted our limited eligibility for many of the grant-relief schemes – whether from government, National Lottery or other funding sources. Such ineligibility for grant schemes is an aspect that is outside the Trust's control, yet is a serious constraint on potential future grant funding.

Gifts and legacies are a highly variable and unpredictable source of funds. While there have been some generous legacies in recent years, these are normally set aside to help deliver specific projects and not used for the day-to-day operations of the Trust.

Fundraising diversification is an area that has been previously highlighted for development. While some steps have been taken (eg to optimise the use of new and

existing grant schemes, to undertake project-specific appeals, and to expand the legacy campaign) other fundraising initiatives widely used by similar organisations (such as membership schemes, setting up subsidiary trading companies, charging for supply of services or goods etc.) lie outside the restrictive powers of the Malvern Hills Acts. Without a change in the Trust's legal powers these options for alternative income streams remain closed to the organisation.

Risks

The Trust maintains a Risk Management Schedule (RMS) in line with Charity Commission requirements. This document is updated by the CEO on a monthly basis and any significant changes reported to Trustees at meetings of the Board. The register categorises different risks into one of four classes – Major / Extreme (red), Moderate (yellow), Minor (blue), and Very Minor (green).

Currently there are 8 areas of Major/Extreme risk identified within the RMS which are highly relevant to this Business Plan. They are summarised as follows:

Government policy change. Uncertainty over the scope of future agri-environment schemes in development and their applicability to MHT land.

Reduced future grant funding. Levels of funding may diminish, or conditions may be applied which mean the Trust is no longer eligible.

Agri-environment Grant administration. Administration of agri-environment schemes now transferred to Rural Payment Agency (RPA), who may make changes to agreements without notice.

Risk of not meeting conditions for existing grants. The Trust might fail to meet the requirements of current grant agreements.

Delays to grant income payments. Cash flow impact of delays in payments due being made by the RPA.

Local campaigns by other bodies or Individuals. Campaigns by individuals or bodies diverting resources away from the Trust's core duties and objectives.

Covid 19 impacts – risk of infection of staff. Potential disruption to the work of Trust staff whether by meeting isolation regulations or from illness.

Tree Disease impacts. This is covered in depth in the Land Management Plan and is the significant and increasing financial and physical risk particularly from the spread of Ash Dieback disease.

Other potentially significant risks identified in the Risk Management Schedule are:

- Covid related restriction on trustee meetings – while reduced, this risk still remains high.
- Reduction in carpark income due to Covid closures
- Local development – South Worcestershire Development Plan (SWDP) and other strategic plans resulting in negative impacts on Trust land
- Inadequate numbers of livestock grazing– increased risk of falling numbers of commoners’ livestock due to retirement and agri-environmental scheme payment changes
- Investments losing value during volatile market periods
- Pension - potential increase in Local Government Pension Scheme (LGPS) contributions following triennial revaluations
- Reserves Policy – adequacy of current reserve retention level in the event of Government restrictions, such as those in force during the first Covid lock down period.

All the above risk areas have a bearing on the plans for the next 5 years. Some may be of short duration while others (such as the future effects of Ash Dieback Disease) will apply for the full 5 year period and beyond.

SWOT analysis

The internal SWOT analysis (Strengths, Weaknesses, Opportunities and Threats) has been updated to help identify risks and opportunities which the Trust faces now, and others that are foreseen for the coming years, and all these elements considered in the drafting of this plan

The analysis identifies those elements that are considered to be strengths of the organisation at the present time, as well as where there are perceived weaknesses. This helps to identify required actions to address weaknesses (whilst maintaining the strengths) and ensure preparations are in place to seize opportunities and mitigate risks, should they materialise.

The full list of elements identified in the SWOT analysis can be found in Appendix 6, page 91.

This page is intentionally left blank

PART 2 - Delivering our core objectives

This section lays out all the individual areas of work that the Trust plans to undertake over the 5 years of the plan – in each case taking into consideration our objects, the current resources of the organisation and the challenges and opportunities highlighted in Part 1. It also identifies clear targets for delivery by 2027.

The full list, along with their proposed timescale and any additional costs are presented in the 5 year work programme in Appendix 1, page 66. The numbering within the text relates directly to this 5 year work programme.



Direction marker made of Malvern stone with North Hill rising behind.

1. Land management

1.1 Landscape conservation

Much of the practical site management work for the coming 5 year period is laid out in the 2021-2026 Land Management Plan, approved by Board in 2021. That document lays out the background information about the Trust's land holding, evaluates the factors that apply to that land and identifies 14 key objectives which will be monitored as a way of gauging how the 5 year work programme is being progressed.

The LMP includes all the regular annual maintenance works MHT needs to undertake across its estate (e.g. grass cutting, scrub control, tree management and path maintenance). Put together these regular maintenance works take up a significant proportion of the Trust's resources each year.

In addition to the day-to-day land management work, the LMP has identified 36 projects that need to be undertaken. Some of these projects are of limited scope and can be undertaken within a short timeframe. Others are larger, longer term pieces of work that in some cases may take years to complete. Timescales and estimated costs for each are identified.

In almost every case however, there is a resource need in terms of finance and/or staff time to deliver these projects. Together with other actions that have been identified since the preparation of the LMP, all 36 projects are included in the paragraphs below and in the following Access and Recreation section, and appear in the 5 Year costed Work Plan (Appendix 1, page 66).

1.1.1 Maintaining the current version of the Land Management Plan

The plan agreed by Board in 2021 is now in operation. Progress is to be reviewed each year starting in 2022, with a major review in year 5.

1.1.2 Enabling effective grazing across the Hills and Commons

A key area of the LMP is to implement works that will better facilitate grazing across the Hills and Commons and in doing so, ensure important landscape features are conserved. This area of work includes making improvements to the current infrastructure to make grazing more viable and effective. The development of methods of livestock control using modern technology may have a major part to play in the future delivery of these aims.

1.1.3 Preservation of archaeological features

The programme of works includes projects to address erosion and damage issues at British Camp and at several locations along the Shire Ditch, as well as elsewhere along the main crest-line footpath.

In addition, several historical features on Trust land need repair and restoration, including the Donkey Shed in Happy Valley (for which planning permission has already been

granted), the listed bowl and plinth in the Well Room at St Ann's Well, and the animal drinking trough on Guarlford Road.

A previous condition assessment of the main footpath to the British Camp highlighted its poor and declining condition. Whilst short term repairs have been implemented, a requirement for longer term resurfacing solution for the whole path is anticipated in the next 4 – 5 years.

1.1.4 Fencing

Repairs and upgrades to quarry fencing have been regularly carried out but further works need to be undertaken. Some of the fencing at Gullet Quarry needs to be further upgraded, whilst improvements are also needed elsewhere at Tank Quarry and Earnslaw Quarry. Elsewhere small sections of fencing to protect specific habitat restoration works will be needed.

1.1.5 Tree and hedge management

The LMP identifies six areas of hedge restoration and tree planting works to be implemented in the next 5 years, as well as various areas of open habitat and pasture woodland restoration. Much of the planned tree planting and hedge laying is anticipated to primarily be funded through grant schemes, from the Gift Fund or from other donations. Much of the open habitat and wood pasture restoration will be undertaken using funds from the Countryside Stewardship Scheme (where applicable). However, there are many areas that will require commitment of either Trust staff time or finances in order to fully complete them. It is also likely that further hedge and tree management works may be possible during the life of this business plan if additional funding schemes can be sourced.

1.1.6 Tree safety works

In line with our adopted Tree Safety Policy, every year the Trust undertakes tree safety works across its estate using professional arboriculturists, Trust staff and external contractors. The cost of this work has dramatically increased in recent years as the volume of trees reaching over-maturity increase, while simultaneously contractor costs of tree works increases due to over-demand for tree services caused by Ash Dieback (see below). Maintaining the safety of the public and minimising the risk of damage from dangerous trees is something the Trust cannot ignore, and standards of inspection and prompt action to address issues have to be maintained. Having the resources (both staff and financial) to keep on top of this area of work is critical.

1.1.7 Ash Dieback disease

The appearance of this disease across the whole of the Trust's land holding presents the organisation with one of its biggest practical land management challenges in recent years. With the peak of the disease expected to occur within the next 5 – 7 years, it is inevitable that a large proportion of our ash trees will require felling and removal. Plans are already in place to address this issue, with an anticipated £340,000 being required to fund the work in the next 5 year period. Adequate financial resources need to be set

aside to ensure tree works can be undertaken each year to minimise the impacts of the disease, while at the same time ensuring that those trees that are resistant to the disease are identified and retained wherever possible, thereby providing a potential source for restocking areas denuded by the disease. Whilst some fund-raising towards these costs has been started, it is expected that a significant part of the Trust's reserves will be needed to cover the cost of Ash Dieback.

1.1.8 Water bodies

Alongside regular annual work to restore smaller ponds and water bodies across the estate, there are three larger projects that need undertaking or completion:

- The Trust has conducted a trial over the past 2 years to see whether *Crassula helmsii* can be eradicated from ponds by excluding light. If this has proved effective the trial needs to be extended to other water bodies on Castlemorton Common where this invasive species has established itself in recent years.
- The Mill Pond at Hollybush will require dredging to remove accumulated silt, and
- A programme of vegetating the margins and open water areas at Gullet Quarry is also included.

While some of these projects are likely to attract grant funding support, some core resource commitment in terms of staff time and match funding will also be required.

1.1.9 Extreme Weather Plan

The Extreme Weather Plan covers action to be taken in the event of severe winter weather, including snow clearance, car park closures and public information. It was reviewed and updated in 2017, but now requires a further review to include the higher probability of extreme weather events driven by climate change, such as excessive rainfall periods, floods, drought and the increased risks of wildfires in dry summers.

1.1.10 Surveys

Surveys are critical tools in steering the management of the land in our care. Over the coming years a number of systematic surveys need to be carried out including one of invertebrates and another on habitat types, as categorised through the National Vegetation Classification (NVC) system.

1.1.11 Managing invasive non-native species

It is important that the Trust keeps abreast of the presence and populations of invasive and injurious plants – most notably Japanese knotweed and Giant Hogweed. Managing and eradicating any populations of these plants is a task that often requires concerted effort and external contractors.

Land Management - What we aim to have achieved by 2027

Required actions	Targets by 2027
Monitor and review the 5 year plan on annual basis, and roll forward.	The actions identified in the LMP 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.	We have improved grazing infrastructure and levels of grazing over all Hills and Commons, with <ul style="list-style-type: none"> - an increase in the number of graziers and/or the number of animals - Adequate levels of grant funding for grazing programmes secured - secure agreements in place covering all appropriate land areas.
Increase facilities on the Hills to enable more effective Hill grazing.	Stock containment measures and water supplies have been improved over the hills, thereby allowing more effective grazing management.
Undertake works to preserve and restore the archaeological features	Works to the Shire Ditch and British Camp have been successfully undertaken.
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 identified tree and hedgerow management by <ul style="list-style-type: none"> - Undertaking an annual programme of scrub woodland management - Undertaking hedge laying programme - Undertaking programme of tree planting 	All programmed areas of hedge laying, tree planting and scrub clearance have been completed.
Undertake annual tree safety survey and carry out required tree safety works	Our tree stock is in good order with all safety surveys carried out and remedial work actioned.
Undertake annual inspections of ash trees for Ash Dieback and action any appropriate felling works	Ash Dieback affected trees are properly identified and surveyed and all requisite felling actions undertaken.
Water bodies are restored and cleared of invasive weed species	The target number of water bodies have been restored
Extreme Weather Plan to be compiled	We have contingency arrangements in place to deal with any severe adverse weather event.
Undertake surveys of habitats and species	Surveys of key species and habitats have been undertaken.

1.2 Access and recreation

Primary objectives for this area of work remain as in the previous Business plan - ensuring that the public can experience and enjoy the Hills and Commons – whilst ensuring that;

- (a) the natural environment which makes it such a special place remains undamaged
- (b) the safety of those using the Hills is maintained
- (c) the public are properly informed about appropriate use the land under our care.

1.2.1 Managing vehicles

The majority of visitors to the hills arrive by car and having appropriate car parking provision of sufficient size and condition is important in managing this. Without it, unlawful car parking on verges and in popular areas of the common causes damage to the Trust's land and destruction of sensitive habitats, by the creation of pull ins, access tracks, rutting and ground compaction. Many of these damaged areas need to be repaired and preventative measures installed to stop further erosion and damage.

1.2.2 Car parking

Alongside the day to day maintenance and repair of the car parks, there are a number of new projects that will be required to improve capacity and infrastructure over the coming 5 years. These include:

- Improvements to the layout and capacity of Black Hill car park – a site that often overflows on peak visitor days with resultant off-road parking impacting on the surrounding areas.
- The southern car park at Old Hills requires re-formatting to allow for more vehicles
- Remodelling the layout of the northern car park at Old Hills to enable both more efficient use and to reduce damaging during busy periods
- Repainting the lines in British Camp car park and installing additional pedestrian safety bollards to this both site and at Earnslaw car park
- Install stobs to a number of the other car park aprons in order to better regulate parking.

New car park meters were fitted to all the pay and display car parks in 2018 and an additional one for British Camp is being fitted in 2022 to provide both for redundancy of one, and to reduce public queuing times at busy periods. Additional car park meters are to be considered for some of the other sites.

1.2.3 Path maintenance

A key area of work identified in the Land Management Plan is the future need to repair and improve sections of path on the main ridgeline in response to erosion caused by visitors. This erosion has been accelerated in the last 18 months through increased numbers of people using the Hills during the Covid pandemic.

Elsewhere the regular programme of path maintenance works will be steered both by the results of the programmed visitor survey, and an update to the network condition assessment. Once these have been undertaken, more detailed requirements for path maintenance and upgrades will be identified.

1.2.4 Improving access

Further access improvement projects are programmed for Link Common bridleway and the Community Woodland path system. Repairs have been undertaken to the Beacon Road track in the past 18 months, but a further phase of repairs and improvements is required in this next 5 year period.

It is anticipated the main concreted pathway to British Camp will require major repair and upgrade works within 5 years' time and this will require extensive and sympathetic works to be undertaken in close coordination with Historic England.

Another aspect of many paths on the Hills is the adjoining revetment walling and steps, normally constructed of stone and cement. There are many hundreds of metres of these walls around the hills and maintaining them in the face of ever-increasing age and deteriorating condition can be a costly and time consuming affair. A comprehensive condition assessment of the network therefore needs to be carried out.

1.2.5 Dogs

It is planned 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. Actions which may help include:

- installation of new signs
- reviewing provision of dog bins
- establishing dog free areas for the benefit of wildlife
- altering access provision

1.2.6 Visitor surveys

It is planned to undertake further surveys of the level of visitor numbers and focal areas of public use on the Trusts land. Such surveys provide valuable data that help identify the key access points, high-use routes and the types of users accessing the land. In turn that information will inform and steer our future approach to access management, signage and interpretation, as well as facilities such as car park provision, easy access trails and new managed routes away from areas of high damage.

Access and recreation - What we aim to have achieved by 2027

Required actions	Targets by 2027
Repair vehicle damaged areas around the verges and commons. Install measures to limit further damage	Locations with vehicle damage have been repaired and measures in place to prevent further damage
Undertake repair and maintenance to car park surfaces, and update / refresh line painting and signage	All car parks are in good physical condition, have clear markings and good signage so that visitors in vehicles and on foot have clear direction
Undertake works to existing car parks to improve capacity, access and layout safety	Car park capacity has been increased and safety improvements have been implemented where needed for all main car parks
Maintain existing primary pathways in good condition	All primary footpath routes are in good order
Undertake repairs to erosion damage on the main ridgeline	Erosion on the main ridgeline pathway has been repaired to a satisfactory condition
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	High footfall routes and sites have been assessed and appropriate improvements made
Undertake works to manage issues arising from bringing dogs onto the Hills	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 regards to livestock
Undertake a visitor survey	MHT has a clear understanding of the numbers, locations and user types visiting our land

2. Resources

2.1 Personnel - Staff, Trustees and Volunteers

The current staff structure of the Trust is shown in the Appendix 4, page 87.

The Trust is fortunate in having both a staff team that are skilled, well-motivated and committed to the organisation and a group of dedicated volunteers, including Trustees, who provide essential support to the staff team as well as undertaking work in their own right on behalf of the Trust.

There is potential for the Trust to attract increased numbers of volunteers who can undertake a wide range of tasks, and in doing so deliver the Trust's objects more effectively. Volunteer recruitment, training and coordination is a therefore key area to be developed in the life of this plan.

Alongside volunteer recruitment there is also a need to invest in the staff resource to ensure the staff roles and structure meet the changing and increasing demands on the organisation and allows MHT to effectively deliver its functions

2.1.1 Staff structure

The workload on staff is expected to increase over the coming 5 year period. In part this arises from the 5 year land management objectives, including having to deal with new risks and threats such as Ash Dieback. It was identified in early 2021 that additional staff capacity in the Conservation Team and the Field Staff team would be needed in the next few years in order to deliver the Land Management Plan. It has also been identified that the Trust could make greater use of volunteers across all aspects of its work, but to do so effective recruitment, training and induction of volunteers needs to be undertaken. A volunteer coordinator role would facilitate a wider expansion in the use of volunteers within the organisation. Lastly, if a step change in the income to be gained from fundraising is to be achieved, an additional member of staff with a dedicated fundraising role is also required. A projected staff structure including these roles is shown in the Appendix 4, page 88.

2.1.2 Fair and consistent employment policies

While the Trust has a comprehensive suite of up-to-date policies relating to all aspects of staff employment (set out in the Staff Handbook) it is important that these receive regular review against current legislation and best practice in order to ensure that they are appropriate and up to date.

2.1.3 Investing in staff development

Training opportunities and provision were largely maintained over the period of the previous Business plan. However, restrictions imposed by Covid measures meant that 2020 and 2021 saw greatly reduced training provision compared to the previous 3 years.

Consequently, there will be increased demand for training in the first 2 years of this plan as we undertake refresher and new skills training, as well as providing training to any new staff.

2.1.4 Undertake job evaluation and benchmarking

The review of job descriptions for all staff was identified as a priority by the Staffing Committee in early 2021. This has been carried out for those posts that have been advertised in the last 12 months, and should be completed for all other posts in the first year of the business plan. A benchmarking exercise was carried out in 2018, and this will be repeated in 2022 / 2023 in order to get an updated view on how the Trust compares against other similar organisations in the sector. This will enable the Trust to ensure it is offering fair salaries that reflect the roles and responsibilities of the posts, and that it is able to recruit good staff on the open market.

2.1.5 Providing improved staff and volunteer welfare facilities

Improvements for Field Staff welfare facilities were completed during the last business plan. Along with a workshop/volunteer facility to be housed in a rebuilt Bottom Shed, (See 2.4.4) there is a need for welfare facilities for those volunteers actively engaged in physical works such as conservation tasks. These will be encompassed within the refurbished Bottom Shed facility. A portable site welfare facility for staff teams undertaking long duration work projects in remote locations may also be required.

2.1.6 Developing an apprenticeship scheme or similar

Initial consideration about including one or more apprenticeship posts within the staff structure was undertaken in 2016/17, but was hindered by the lack of a local training provider offering the types of training appropriate to the work of the Trust. Offering apprenticeship posts within the organisation would be a positive step for both the Trust and local young people looking to have a career in the land management sector, and this option needs to be reviewed regularly in the coming years in the hope that relevant courses become available.

2.1.7 Developing volunteering within the charity

Volunteer numbers and time contribution increased over the first three years of the last Business Plan, with an increase in volunteers undertaking practical conservation tasks, and volunteer wardens, including a new volunteer fishing and water warden.

Covid has had a major impact on the level of volunteer involvement with the Trust over the past 21 months, but new procedures for booking on volunteer tasks coupled with an increase in the number of task days per month (partly enabled through having a fourth warden from summer 2020) has led to a recovery in numbers of outdoor volunteers.

Further work is required to recruit additional volunteers in more specific roles, to provide appropriate induction, and to improve training, with the following areas currently identified:

- Recruitment is needed for competent Volunteer Wardens, able to support the wardens with regular weekly wardening duties
- Volunteering in the office-support and archiving roles was regularly maintained pre-Covid, but saw a dramatic fall-off in numbers from spring 2020 to date. Significant effort will be required in the first 2 years of this plan to recruit and induct new volunteers in this area.
- And extra volunteers will require coordination and management – something that is currently undertaken by existing staff. Priority needs to be given to finding a volunteer coordinator role, which is itself to be a volunteer role.

Personnel - What we aim to have achieved by 2027

Required actions	Target by 2027
Review the staff structure and implement changes to increase capacity to meet workloads	The organisation has a staffing structure adequate to meet its needs, and with appropriate skills sets
Review staff policies against current legislation and best practice	The staff handbook up to date against current legislation and provided to all staff
Undertake review of training needs / provision and provide appropriate training for staff to effectively undertake their roles	Individual staff members and the organisation as a whole are benefitting from continuous development of skills and knowledge
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 and workshop facilities for volunteers	All staff and volunteers have access to adequate welfare facilities
Develop and implement an apprentice / work placement scheme	We have been able to provide apprentice spaces and associated training
Develop the range and use of volunteers through increased opportunities and a volunteer coordinator	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

2.2 Finance and funding

The Trust has powers under the Malvern Hills Acts to raise a levy in 7 wards and 3 parishes in the Malvern area. This provides a secure source of income, which in recent years has amounted to around 43 % of the Trust's total income.

The next largest source is the ten pay-and-display car parks under the jurisdiction of the Trust. In previous years this has generated about £270,000 per annum (approx. 31 % of total income), but in 2020/21 this revenue stream saw a 52 % increase to £413,000 as a result of higher visitor numbers during Covid travel restrictions.

The third largest source of income is from various Agri Environment schemes (Higher Level Stewardship and Countryside Stewardship). These funds totalled £192,000 in 2019/20. This income is ring-fenced to provide the required management of the land within each the scheme.

In 2020/21 this source of funding was severely curtailed in one of the Stewardship Scheme areas, as a result of unilateral changes made by the RPA to the payment basis of the Scheme, with the result that £150,000 of payments was withheld by the RPA. Whilst this dispute has since been resolved in the Trust's favour, it has highlighted the risk of similar changes being made unilaterally and without notice in relation to other agreements, jeopardising the management of the land in question and threatening third party agreements which the Trust has entered into.

Compared to similar charities managing iconic landscapes of similar size elsewhere, the Trust receives a relatively low proportion of its funding from legacies and donations.

Challenges

There are a number of major issues and threats regarding the Trust's income when looking at the next 5 years. The most significant are:

- uncertainty over both income streams from existing Countryside Stewardship and lack of detail on what funding can be secured under successor schemes
- costs of materials and equipment escalating due to post Covid price inflation
- lack of income diversity
- unpredictability of car park income
- rising costs of tree management and dealing with diseases like Ash Dieback

If all the aspirations of this Business Plan (and the Land Management Plan) are to be delivered, significant steps will need to be taken to control costs and increase income. The key financial steps needed are:

- securing future grants
- developing new, and existing, income streams
- having appropriate contingency plans in place to reduce and managing ongoing liabilities in the event of fluctuations in income

- effective budgeting against expected inflation levels
- controlling expenditure and ensuring efficient use of resources
- ensuring we have an appropriate and robustly applied reserves policy

2.2.1 Budget forecast and expenditure control

The 5 year budget forecast is shown within Appendix 1, page 66. This forecast is to be reviewed annually, along with the wider review of the Business Plan. The forecast is based on current expectations of inflation levels, but is sensitive both to future changes in inflation and salary costs. The table at the end of section D illustrates that range of potential variation and underlines the need to regularly review the forecast in light of any change.

Similarly, income projections are based on current levels projected forward, but do not make allowance for significant world or national scale events such as Covid, which might impact on income streams.

To meet the projected annual balances and maintain appropriate reserve levels, continued careful management of costs needs to be maintained along with controlled and prudent implementation of all new Business Plan elements.

2.2.2 Reserves Policy

An updated policy was adopted by the Board in 2020. Annual budget preparation and quarterly monitoring takes heed of the thresholds in this policy and the Finance Administration and Resources Committee is alerted to any variation away from the policy. The Covid pandemic proved just how important this policy of retaining sufficient reserves is to the Trust. It is therefore highly important that the policy is regularly reviewed and diligently applied.

2.2.3 Pension deficit

A full review of the staff pension arrangements and the Worcestershire Pension Fund. (WPF) liability was undertaken from 2015 - 2017, with the outcome being the closure of the WPF to new joiners and an agreed scheme of repayment of the deficit over 18 years agreed with the WCC Pension Scheme. This arrangement has provided the organisation with a clear method for the discharge of the deficit. Since then there has been one triennial revaluation of the scheme, which saw the Trust's share of the scheme deficit decrease to £926,000. The Trust needs to maintain due diligence over this arrangement and review its progress towards discharging the pension deficit in light of any future revaluations.

2.2.4 Car park income

MHT needs to maintain the value of its car park income – whilst ensuring that charges are reasonable and are effectively collected. The price of day tickets and annual permits has been regularly increased by inflation-based increments (rather than less frequent step changes) made each year since 2016. A new suite of card payment accepting machines was installed in 2017 and since the advent of Covid, the proportion of card payment to cash is now 75 %, providing greater security and ease of ticket provision.

A review of the charging policy, tariff levels and condition of the Pay-and-Display machine was due to be undertaken in 2021 but was delayed due to the Covid pandemic. This is a priority for year 1 of the new Business Plan, with consideration to be given to short stay and evening tariffs and other options. Any proposals will need to at least preserve current income levels and ideally increase them.

Additionally, there is a need to review and improve the capacity of some of the existing pay and display car parks, as well as review the provision of free car parks elsewhere on the Trust's estate.

2.2.5 Agri-environment grant income

As detailed on page 13, the current systems of agri-environment support for land owners is undergoing a period of major transition. Exact details of future schemes for which the Trust's land may be eligible are undetermined at the time of writing. There is an ongoing need to monitor the development of new schemes and, when available, make best use of them to support the work of the Trust

2.2.6 Fundraising and income diversification

There is a need for a range of initiatives to be undertaken to increase and improve the organisation's fundraising and income generation. A number of options were identified in the last business plan, with some others being considered since.

However, many of these initiatives are dependent on gaining wider fundraising and operational powers, which can only be achieved through an update to our existing Acts.

Possible options include:

- Development of a membership scheme
- Sale of by-products (wood, wood chip, compost)
- Retail opportunities through wholly owned subsidiaries
- Sale of energy - both of electricity to the grid derived from solar panels, and sale of electricity to the public through electric vehicle charging points.

As detailed elsewhere the progress of work towards any update of the existing Acts is as yet uncompleted. These elements have therefore been included in the current plan in anticipation that some form of approved update of the governing documents may be forthcoming within the first three years of the life of this plan.

General fundraising targets

An increase in the numbers and scale of direct appeals for specific projects (eg tree planting and interpretation boards) is planned for the coming years which is anticipated could raise income of up to £30k per year.

In addition to those specific, restricted fundraising targets, a further target of £15K per annum has been identified for general fundraising in the first years of this plan (during the period when implementation of wider fundraising initiatives opportunities as per 2.2.6 would not be available). The recruitment of a Fundraising Officer is budgeted for 2024/25 with concurrent increase in donations from that date.

To deliver a more significant upturn in fundraising income will require significant additional staff time in the research, compilation and submission of grant applications, as well as in their project management. Staff time is already fully committed, so a step change in fundraising can only be achieved through either reducing work commitments in other areas of operation, or recruiting a dedicated (paid or voluntary) fundraising officer. To this end, a new part-time fundraising post has been projected within the programme from year 3 onwards. Such a post will need to generate at least double its costs in free unrestricted income per year to be financially worthwhile reflected in the financial forecasts from 2025/25 (Appendix 2, page 80).

2.2.7 Donations and legacies

A number of legacies, including two sizable ones, have been received over the past 5 years and these contributions have been a major boost to the Trust, providing valuable funding support for various project works in the past as well as supporting other programmed for the next 5 years.

Several promotions to encourage contributions have been implemented in the past and it is intended that this continue. The legacy leaflet is to be reprinted and redistributed at least twice in the coming 5 years, with its promotion tying in with national legacy week initiatives as well as other major events or campaigns the Trust is promoting.

2.2.8 Investment of capital

Following adoption of the new investment policy, the Trust changed its investment policy in 2014 and engaged an investment management company to advise on investment of its medium to long term reserves. Performance of investments is reviewed on a quarterly basis by senior staff and members of FAR Committee, assessing investment performance against the Trust's approved Investment Policies. As well as maintaining this regular oversight, the Trust's investment manager reports direct to a trustee meeting twice a year.

During the next 5 years the Trust should review the terms, costs and level of service provided by the current investment managers and benchmark the investment portfolio performance against other investment companies.

A review of the capital projects list has been completed and projections of costs are included in the Business Plan. These figures will need further revision at each annual review of the Business Plan, as well as reconsideration in light of changes to policies agreed by the Board such as the vehicle replacement policy and the progress of the planned governance reforms.

2.2.9 Levy income

Potential increases in the levy are considered on an annual basis by the FAR Committee when preparing the budgets for each year, before the final decision on the increase is taken by Board. Current levels of levy are well below their potential maximum and consideration needs to be given to proportionate future increases to support the work required now and in the future.

Finance and funding - What we aim to have achieved by 2027

Required actions	Targets by 2027
Compile medium term 5 year budget forecast to have a clear picture of future budget requirements for 2022-2027. Control costs and manage timing of project implementation to fit 5 year budget forecast	To have completed the programmed works within the relevant timescale and within budget
Review the Reserves policy annually to take into account good practice guidelines and changing circumstances	MHT holds adequate reserves (in appropriate accounts) to meet our short, medium and long term expenditure needs at all times
Carry out a full review of all the car parking, to include: <ul style="list-style-type: none"> - The number of car parks where charges could be applied - Options for separate short stay and long stay charging - Tariff levels - Introduction of new payment methods 	By September 2022 have a clear plan of future charging rates and ticket machine replacement. By 2026 car parking provision has been expanded / improved and income generation increased by 20 %
Closely monitor the terms of successor agri-environment schemes. 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 successor agri-environment schemes available. Any short fall in income has been identified and replacement income sources found, or the Land Management Plan has been amended to take account of the income reduction.
Diversify income through new fundraising initiatives	Increased levels of income are coming from other new diverse sources
Increase and maintain income from grants, appeals, corporate support and sponsorship to £30k per annum for specific projects and £15k per annum for unrestricted income	Target Income from these other streams of £225,000 over 5 years has been achieved
A legacy campaign is needed with clearly identified objectives and a Legacy Project List compiled of non-time-critical projects (interpretation boards, benches, paths etc) for which support can be given	We are receiving regular support through legacies for our work, and the Legacy Project List is being promoted and supported
Regularly review and continue to monitor performance against the Trust's investment strategy and assess performance against other benchmarked providers.	The investment strategy performance is regularly monitored and the performance measured against other investment managers
Set the levy annually	MHT receives an appropriate level of income from the levy to support its work

2.3 Equipment

In order to manage its land holding the Trust owns and operates a range of vehicles, machinery and equipment. This machinery represents a significant capital investment and needs both proper maintenance and appropriate planning for its timely replacement to avoid unexpected major capital costs.

2.3.1 Vehicle management

The policy on replacement of vehicles was updated in 2019 with an amended write off period for certain asset classes. Alongside a proper maintenance plan, the schedule of replacements has been implemented over the past years and this programme will continue over the next five years. Anticipated total capital equipment costs are shown in the 5 year financial forecast (Appendix 2, page 80).

2.3.2 Plant and machinery

Similarly, plant and machinery replacements have been programmed to be undertaken in line with the machinery replacement programme while the anticipated lifespan of many pieces of equipment has been reviewed by staff in the preparation of this new Business Plan.

In addition to the like-for like replacements, there are a number of pieces of equipment that would benefit from re-evaluation to determine if more effective use of their replacements can be achieved. These include:

- reviewing suitability of a robotic flail / multi task machine in place of the large tractor
- replacement of one of the field staff vehicles with an all-terrain vehicle
- replacement of the rotovator with a smaller model plus light grassland management attachments suitable for restoration and repair of damaged verges and common areas
- acquisition of a general purpose timber trailer
- acquisition of a plant trailer

A full schedule of the programmed plant and machinery replacements is provided in the Appendix 7, page 94.

2.3.3 Test and trial of low carbon /alternative power source equipment

As part of the vehicles and equipment procurement programme, and in line with the sustainability plan, trials of potentially suitable low carbon, electric or alternative power source equipment will be undertaken. The results of those tests and trials will feed back into the annual revision of the Business plan and any updates to the procurement plan made.

Equipment - What we aim to have achieved by 2027

Required actions	Target by 2027
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 money
Review and undertake planned plant and machinery procurement to meet the organisation's needs	We have available the plant and machinery that provide effective tools in our work and are well maintained
Test and trial low-carbon equipment	Low carbon replacement machinery has been researched and trialled and selected where appropriate



Malvern Hills Trust vehicle parked whilst staff undertake work on Summer Hill.

2.4 Buildings

Buildings are a major asset of the Trust and play a key role in enabling the Trust to undertake its work effectively. Having adequate capacity for the various functions of the organisation – as office space, archive storage, public counter and information, meeting room, machinery and equipment storage and workshops – is essential. It is important to ensure that the buildings are maintained in appropriate condition, are safe and are fit for purpose.

A building maintenance programme has been undertaken over the past 5 years and this is to be continued over the lifetime of this Business Plan. Separate from maintenance, there are more significant capital works that have been identified as being required to make the buildings more suitable in the coming years.

2.4.1 Manor House

Space within Manor House is limited and a review of the buildings capacity previously identified limitations which restricted the future development of the organisation, including limited public counter space with no proper public interpretation facility, limited capacity for additional staff or volunteers, lack of storage space, an inadequate kitchen and lack of a meeting room which is large enough to hold board and committee meetings with public attendance.

Some works have been carried out to Manor House, (replacing the windows and improving the public entrance footway in 2017/18, revising the second floor layout and upgrading lighting in 2021) but other improvements need to be undertaken. A proposed scheme of works prepared in 2018 (with architect and Quantity Surveyor input) was considered too costly and a revised scheme of more affordable changes was adopted. The planned implementation of those works (kitchen and admin space improvements) planned for 2019/20 was set back by Covid, but was rescheduled for the first two years of this Business Plan.

However, it would be more appropriate to have a full review of whether it would be more effective to move premises, rather than make changes to a building which will still have limited capacity.

2.4.2 St Ann's Well

An extensive programme of internal and external refurbishment agreed in 2015/16 was undertaken in 2017, and as a result the building is in good condition with repaired roof, windows and exterior, improved insulation, heating, electrics and gas all renewed. The only element not completed due to the constraints of the listed building status was changes to the external stairway. This element needs further investigation in the coming years before a method of work and costings can be arrived at. Otherwise an inspection and maintenance programme for St Ann's Well is to be continuously implemented.

2.4.3 Top Shed

Welfare facilities were completed at this location in 2016/17 and the old inspection pit was filled in during 2018/19 to create more usable internal space.

Further space for secure internal storage of machinery and equipment will be required in the coming years, as well as a revision of the external layout to allow for more efficient storage of bulk materials used in or produced by the estate works.

2.4.4 Bottom Shed

A review of the building's condition and function was undertaken in 2018 with an in-principle decision taken to repurpose the Bottom Shed as a storage and workshop facility for volunteers as well as staff. Initial plans have been compiled for a rebuilt timber structure to provide the appropriate facilities, but this work was interrupted by the Covid Pandemic. Initial applications for grant support to take forward the project were made during 2020 but were unsuccessful. This work has since resumed with a more detailed specification and estimate of costs expected in 2022. Implementation of the works (dependant on funding availability) are now anticipated for 2022 - 2023.

2.4.5 Donkey Shed

Planning permission for the restoration and refurbishment of this historic structure was obtained in 2019, but implementation was again held up by the Covid Pandemic. Updates were obtained in 2021, in advance of submission of grant applications and it is anticipated that the works will now be undertaken in 2022/23 and will be funded by grants.

2.4.6 Toilets

A new self-contained sewage treatment plant to replace the old cess pit serving British Camp toilets was installed in winter 2021/22. No further major works in relation to toilets on Trust land is currently anticipated. Discussions over current and future maintenance of the public toilets erected on Trust land by the relevant local authorities is ongoing.

2.4.6 Other Buildings

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 external consultant in 2017 and a revision of those values is required in 2022/3.

Buildings - What we aim to have achieved by 2027

Required actions	Target by 2027
Review options and feasibility of refurbishment of Manor House as against relocation of the offices	Options have been reviewed before further works on Manor House are undertaken
If it is decided to remain at Manor House undertake refurbishment and improvement works	Building is in good condition, secure, weatherproof, and provides an enhanced capacity of office and administration space
Undertake scoping study for a future building development combining multiple uses	MHT has a clear understanding of what will be required from any new development
Undertake further works to Top Shed	Internal Storage capacity and external bulk material storage meets the needs of the organisation
Refine proposals and implement works to Bottom Shed	Site serves the required functions as storage and a workshop area for staff and volunteers
Undertake planned restoration works to Donkey Shed	Building is restored to good condition with interpretation and visual access for the public
Undertake an audit and condition assessment of all other buildings and prepare maintenance schedule	All other buildings are being maintained to a minimum standard on a regular basis

2.5 Information technology

IT equipment is essential to the day to day operation of the organisation and it is important that it is maintained at an appropriate level of condition with affordable hardware and software that is of a standard that meets the needs of the charity. If not kept up to date, computer system security is one of the biggest vulnerabilities of any organisation and it is essential that this is prioritised.

2.5.1 Hardware

The Trust needs to maintain a suite of affordable and 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 proper and effective communications.

Following a review of all hardware in 2017/8, the inventory of equipment has recently been reviewed and an updated schedule of phased replacement of machines will be prepared. Alongside this, the existing maintenance service contract for the IT systems also needs to be reviewed.

2.5.2 Software

The software systems used within the Trust need to be maintained at a level where they meet the needs of the Trust and are up to current minimum specifications required to effectively communicate with the public and other organisations. The average life span of most software packages is 6-8 years before a major revision or change is required. Changes for different software types can sometimes be phased over several years, and this has been included in Section 4 of the Project Plan (page 79). However major upgrades to the operating system and core program suites (currently Windows 10 and Office 13) will be required in the life of this plan and costs appropriately allocated.

2.5.3 Security

Significant improvements to the cybersecurity systems within the Trust have been implemented over the past 3 years with high speed broadband, new active antivirus, on line backups systems, email and spam filtering systems all installed and updated. The very nature of cybersecurity is that it is constantly evolving and therefore the Trust cannot afford to stand still in this regard so further upgrades and improvements will be required at regular intervals in order to ensure that the risks to the organisation from hacks, ransom ware and data loss are minimised.

Information technology - What we aim to have achieved by 2027

Required actions	Target by 2027
Review scope and renewal programme for hardware	MHT has an appropriate level of IT provision that serves the organisation properly, within budget
IT service provision is reviewed	All software and hardware is supported by an appropriately skilled and qualified external IT service provider, at a fair cost
Renew and update software	Software is maintained properly and serves as an effective communications and administration tool
Maintain update programme for all aspects of IT security	There are appropriate levels of security across all areas of IT within the organisation



View of the Malvern Hills ridgeline from near Castlemorton

3 Communications

Good communication, both internally and externally, is vital in enabling the effective delivery of the Trusts objects.

3.1 Public communication

The Trust needs to communicate effectively with the public for a number of reasons including:

- to provide clear and effective information about where to go and how to use the Hills in an appropriate way
- to inform people about the Acts, the byelaws and the need to comply with those byelaws
- as a charity to provide the public with information on how our funds are raised, how it is spent and how those decisions are being made
- to provide visitors and local residents with information about what is happening on the Hills, what work the Trust is undertaking and why that work is necessary
- To respond to issues and topics raised by others which relate to the Trust's land

Good public communications generate better understanding of the aims and objects of the organisation and encourages more direct support for our work (eg volunteer recruitment).

There is also a need to maintain effective internal communications, for efficient management of the organisation.

To achieve all this requires a clear communication approach applied across a range of media that is appropriate to modern society. It needs to provide effective public liaison and information dissemination through a combination of website, social media, leaflets, information boards, onsite signage and through the press and radio.

3.1.1 Interpretation Strategy

This strategy is due for a review. Having been delayed as a result of Covid, this is now planned for 2023/24, and is expected to shape the future development of all aspects of our public interpretation.

3.1.2 The Trust name and brand identity

Having a strong brand and identity, coupled with clear communication of key messages, is important in gaining public engagement and understanding. These are also powerful tools for encouraging grant awarding bodies to support the organisation.

The working name Malvern Hills Trust was adopted in April 2017 and registered with the Charity Commission and adopted in April 2017. Rebranding of the web site, social media, written communications, staff workwear and new leaflets was undertaken shortly

afterwards. Replacement of older leaflets was subsequently undertaken and a phased programme of replacement site signage and interpretation panels continues into the period covered by this Business Plan.

The working name has been applied across all media and communications and has been generally well received by the public. Most importantly, evidence both from anecdotal records and from visitor surveys (undertaken prior to and after the rebranding) indicate that there has been a much improved public awareness and recognition of the Trust as a charity and as the body that cares for the Hills.

The next progressive step would be to formally change the name of the organisation to the Malvern Hills Trust, but this can only be achieved through an update of the Trust's governing Acts.

3.1.3 Website

Websites need to be regularly maintained, with interesting, dynamic site content in order to be effective. As the first point of contact for the vast majority of the public with MHT it must be accurate, informative for the user, and relevant to the works of the Trust. Out of date or erroneous information on a website can be misleading and annoying to the public, while website security needs to be maintained at a high level to protect the Trust from both significant reputational damage and potential penalties from regulatory authorities.

The current Trust website, launched in April 2017, is now approaching 5 years old. It included major improvements on the previous version including mapping features showing car parks, paths and bridleway network as well as easier access to a much wider range of information.

While minor upgrades and improvements have been made over the intervening years, methods of accessing websites constantly evolve and it is important to maintain the website at a standard that can be easily accessed by the greater majority of devices used to access it. Consequently, a review and major upgrade of the platform is anticipated to be required within the next 5 years.

In addition to the review of the website itself, there is a need to ensure there is adequate staff capacity with appropriate skills to maintain the website on a daily basis.

Further training for staff in the platform management systems is required.

3.1.4 Signage

Following the rebranding in 2017, an extensive programme of replacement was undertaken between 2017 and 2020 including vehicle graphics, logoed staff clothing, signage at St Ann's Well and the main office building's external signage.

There are still many smaller, lesser signs scattered throughout the estate that need updating, and it is programmed to finish dealing with these in the first year (2022/2023).

Alongside that, there has also been a programme of updating of the interpretation signage across the Trust's estate and it is planned that this work will continue, with 6 existing or new interpretation signs expected to be produced within the first 2 years of the plan lifespan.

In addition, the Land Management Plan has identified the need for new location name plates to be installed at many of the Trust's pieces of land. (*Project #1: New MHT identification posts and/or signage to be added to all separate MHT land parcels and well-used parking areas.*). It is intended that this signage, to be made of durable, high quality materials, will identify to the visitor that the land is part of the Trust's estate. This element is programmed to be implemented in the first two years of the Business Plan.

3.15 Publications

Whilst the website and social media platforms are now the principal mode of communication between the Trust and the public, printed media still has an important role in the organisation's overall strategy of public engagement – particularly for onsite engagement with local residents or the visiting public.

A number of publications have recently been created or renewed as part of maintaining good public communications. They serve a range of functions – from information to fundraising – and are professionally produced to the standards of our branding style.

In the coming 5 year period it is anticipated that some publications will require annual updating and reprinting, some will require bi-annual reprints to satisfy demand, whilst others will require less frequent print runs to maintain supplies.

The table overleaf indicates the type, frequency and number of leaflets to be produced, many of which would also be available in digital form through our website.

Publication	Frequency	Expected print run
Levy payers' leaflet	Annual	5000
Annual events leaflet	Annual	1000
Annual Review	Annual	100 (printed)
Walking and Cycling map	2 years	10,000
Cycle Routes guides	2 years	6000
Good Neighbour Guide	2-3 years	1000
Legacy Leaflet	2-3 years	5000
Jurisdiction map	Five years	1000

In addition, new leaflets will need to be produced in association with planned campaigns or new initiatives. While these are to be identified as part of the review of the communications strategy, it is expected that printed literature will be needed to accompany each of the anticipated campaign topics.

3.1.6 Events

Each year the Trust operates a series of events that are open to the public as part of our public engagement and communication works. These were suspended during much of 2020 / 2021 due to Covid restrictions but it is planned to restart them with a new programme for 2022. Well-received by the public, they allow for direct engagement on specific topics related to the Trust's work.

In some years the Trust has taken a stand at the Three Counties Show or other major show events held at the Three Counties Showground. Whilst public attendance at such events has been high, the numbers of public engaging with the Trust on-site has been found to be relatively low, particularly in light of the high cost of attending such events.

It is therefore intended that the focus of larger events in the coming years will be shifted to hold event days, to be centred at locations on Trust land with high visitor number, such as British Camp. This will provide more opportunities for direct engagement with the public users of the land, to educate and inform them of the landscape and its significance.

To deliver this series of events our stock of display materials will need to be updated on a regular basis from year 1 of the plan. This new approach will also require staff time, which will need to be supplemented by recruiting more volunteers to assist in this work.

3.1.7 Press and media

Changes in the way society accesses information means that social media interaction with the public is now the most significant vector for the Trust to provide news and information. It is still important that the Trust engages with traditional media providers (radio, television and newspapers), but it is commonplace for them to respond in the first instance to items already posted on social media platforms.

Improvements to the website (see 3.1.3) and the provision of links to social media platforms, coupled with regular staff input and provision of news stories, has greatly improved our media capability. Occasionally single interest groups seek to divert news items onto other topics as a way of pressuring for their particular interest. Prompt, accurate and reasoned on-line responses by staff are required to effectively manage such events. On other occasions there has been inaccurate information about the Trust published online or appearing in the traditional media outlets. Wherever appropriate staff seek to get them corrected.

It is important that over the coming 5 years the organisation continues to maintain an up to date media presence on all platforms, supported by appropriate staff capacity. Alongside this, MHT will also need to explore other developing methods of communication, whether through new digital platforms and apps, direct on-site interpretive panels or other innovations.

A key focus of media attention will inevitably surround decisions about and progress towards the development of a new Act of Parliament. Providing consistent, accurate and relevant public information as well as stakeholder engagement (see below) will be critical over the probably 2-3 year time period when that work will be in progress.

3.1.8 Other communications – Stakeholder engagement

Along with the need for information dissemination via the media (as above) any new Private Bill will require time and effort to be spent on engaging with the many stakeholder groups at several stages as the Bill progresses. It is anticipated that this will require input from staff, trustees and external consultants.

Communications - What we aim to achieve by 2027

Required actions	Target by 2027
Review the interpretation strategy within the first two years	A clear strategy for future public interpretation and communications is in place and being applied
Include formal change of name in governance reform	The name Malvern Hills Trust is formally adopted and used across all communications
Renew and update the website	The current website has been fully updated to include appropriate compatibility and functionality
Update all small signage across the estate Update and replace 6 interpretation panels Install ownership markers to Trust land holdings	All signage bearing the old branding has been replaced with MHT branded signage. Interpretation boards are up to modern standards, legible and with updated information. Ownership markers are installed at all required locations including site specific information where appropriate
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
Operate an annual programme of events and undertake focal event days each year	Subject to any further Covid restrictions, a programme of public events is undertaken each year
Maintain regular public information on website and social media platforms on a weekly basis. Respond to queries and contacts in a prompt and appropriate manner Explore potential expansion of website and social media use in light of new innovations	Each year articles regularly appear online in the local and regional media about MHT's work and highlighting the importance of the Hills, their wildlife, and issues relevant to their management

3.2 Campaigns

As part of its core public engagement strategy the Trust undertakes a number of campaigns that focus on particular topics relevant to its work. Information is presented across a range of platforms and in different media for a sustained period of time in order to optimise the opportunities for the relevant information to reach the public.

Alongside the regular short campaigns it is anticipated that there will be a series of longer duration campaigns focussing on and highlighting particular topic areas. These are listed below but it is important that the Trust retains a flexible approach and is able to respond to any new issues that may have a significant adverse impact on the land we manage.

3.2.1 Short campaigns

Each year there is a need to undertake short media campaigns focusing on specific but time limited topics. These include

- dog walking on the Hills / stock worrying in the spring,
- water safety during the summer months,
- wildfire risk /barbeque hazards during dry periods.

In recent years the duration and timing of fire risks has changed, with high risk periods extended and intensified due to changes in climate. This campaign needs to be regularly covered, with the campaign messaging requiring longer input.

Following on from short legacy campaigns of previous years encouraging people to leave a legacy to the Trust, there will be reminder campaign messages put out each year to be focused around the national *Remember a Charity* week. This campaign will include circulation of leaflets to all local firms of solicitors and details of projects to which legatees could specifically donate being promoted through the website. Reprints of the legacy leaflet are expected to be required every 2 – 3 years to maintain supplies for the promotion periods.

3.2.2 Responsible mountain biking

To reinforce the messages of the previous mountain biking campaign, there will be supplementary campaigns to remind those riding cycles on the Hills how to use them responsibly. These will require reprints of the ever popular walking and cycling maps and route guide cards.

3.2.3 Dogs and dog walking

People walking dogs are potentially the single largest user group of all those who regularly access the Hills and Commons. It's intended to undertake a more visible campaign highlighting the need for responsible dog ownership, including keeping dogs under control, particularly around livestock, removal and disposal of waste, and minimising impacts on wildlife.

3.2.4 Other potential campaigns

Parking - To coincide with project works to limit damage from parking, a campaign may be required to highlight to the public the need to park responsibly within designated areas, reduce damage to the landscape and improve the behaviour of vehicle drivers while on MHT land.

Erosion and access - To promote greater understanding of the increasing impacts of erosion on the landscape caused by public access and to promote better awareness of how to minimise their footprint by choosing the best routes and ways of walking or cycling the hills.

Campaigns - What we aim to achieve by 2027

Required actions	Target by 2027
Undertake short campaigns on key topics	Annual short campaigns have been undertaken to deliver messages relating to: Fire risks and barbeques, stock worrying water safety, legacies
Undertake responsible mountain biking campaign	Campaign has delivered in 2022/2023: <ul style="list-style-type: none"> - clear information and publicity about responsible cycling on the Hills. - an understanding of what responsible access means amongst mountain bikers using the hills - a reduction in conflict between mountain bikers and other users
Undertake responsible dog ownership campaign	Campaign has delivered: <ul style="list-style-type: none"> - clear information and publicity about responsible dog walking on the Hills. - a reduction in dog mess, dog attacks on stock and dog related conflict with other users. - A positive relationship with dog walkers.
Undertake other campaigns including messages relating to responsible parking and erosion impacts	Campaigns have delivered: <ul style="list-style-type: none"> - clear information on their topics - contributed to a reduction in incidents of poor vehicle use of the Hills. - reduced erosion damage caused by vehicles, walkers, cyclists and others

3.3 Partnership

There are a number of current and future projects which are or would be of benefit to users of the Hills which fall outside MHT's direct powers to deliver, but may be achieved by other organisations working in partnership with the Trust.

3.3.1 Disabled access by vehicle

The Tramper project, sponsored through the AONB provides facilities for people with limited mobility to access the hills. The project, which is based at the Wyche Innovation Centre, provides access to low cost hire of two off-road mobility scooters for the public. These are now used regularly by members of the public to access the main track to the Beacon.

Alongside this facility, a separate project run by the local Rotary group together with Land Rover Experience of Eastnor provides a number of specialist access event days taking those with more significant mobility issues up to the Worcester Beacon. Whilst the Covid pandemic had significant impact on this project it is hoped that it will be able to recommence operations in 2022.

In both cases, the Trust supports the partnership project by permitting vehicular access to the Beacon within an agreed set of protocols.

3.3.2 Educational projects.

In the first years of the 2016-2021 Business Plan efforts were made to engage with local educational organisations on projects and initiatives linked to the Hills. Staff and volunteer availability determined how much time could be devoted to this project and it was effectively halted by Covid restriction in 2020/ 2021. This engagement work needs to recommence in the coming years but with more focus on projects that provide measurable benefit to the Hills – e.g. through development of projects such as remote sensing of habitats, collection of environmental data or execution of surveys.

3.3.3 Wider landscape initiatives

The land under the Trust's care is not isolated from the surrounding landscape. It both impacts on the surrounding land and is affected by that area in a number of diverse ways – whether acting as a reservoir for native species that may repopulate the surrounding countryside, or as the receptor of tree pathogens spreading through adjoining habitat blocks. Internally the Trust's Wildlife Panel acts as an important means of communication with other groups on such topics. Alongside that there is also an important liaison role for MHT to keep abreast of wider landscape initiatives led by other partner organisation such as the AONB, Wildlife Trusts or similar groups.

3.3.6 Tourism Interface

MHT's objects do not include a tourist information role, but the Trust does provide public information about the land it is responsible for, both directly and through other parties such as the Tourist Information Centre. Part of the review of the interpretation strategy

will be to look at the range of information provided and the routes by which it is reaching visitors to ensure it is being effectively used.

Partnerships - What we aim to have achieved by 2027

Required actions	Target by 2027
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
Improve links to organisations with educational projects that could support our management of the Hills	Relevant research and survey projects have been enabled across the Hills that support the management work
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
Review the range of public information made available and the mechanisms for its distribution via other parties	Appropriate publications and public information is made available through partner organisations such as the Tourist Information Centres



Conservation volunteers take a break on North Hill during a task

4 Organisation and infrastructure

4.1 Governance

MHT started an internal review of its governance arrangements in 2013. The Governance Handbook was rewritten, and new policies and procedures drawn up. These (subject to regular updates and amendments) are now embedded within the organisation.

That review also identified many changes that would enable the Trust to be more effective in delivering its duties and objects and to meet current best practice. From 2014 the Trust began working on a major review of its Acts and a set of proposals were approved by the board before being put out for public consultation (page 12).

Subsequently, advice was received from the Charity Commission and Department of Culture Media and Sport that *“these changes to the charity’s governing documents would now be best handled via a private bill, allowing greater scope for public scrutiny and debate than under a parliamentary scheme procedure”*

<https://www.malvern hills.org.uk/get-involved/public-consultations/governance-update/>

In light of that advice, and in order to make an application for a new Act, approval under s 74 Charities Act 2011 is required from the Charity Commission (or the court) for the expenditure of charitable funds in connection with the preparation and submission of a Private Bill to Parliament.

As of the time of writing, the board of Trustees, having considered the costs and benefits of seeking a new Act, have decided to take this step and seek Charity Commission approval under Section 74.

4.1.1 Achieving the modernisation of our Acts

It is anticipated that this would be a major project for the Trust over the coming 5 year period, taking time and resources in order to be achieved.

Subject to the outcome of the forthcoming section 74 application, and any subsequent decision by the Board of trustees on whether to seek Parliamentary approval of new Act, it is projected that it would take 2 years or possibly longer to see such a Bill receive Royal Assent.

The projected costs of this work have been identified within an analysis of the costs and the benefits of seeking a new Act. The proposed mechanism for its funding would be a loan from Land Acquisition Fund, with a mechanism for repayment the resulting loss of income and the capital sum. Dedicated staff time has been also identified as being required over a 2 year period or thereabouts, alongside the professional services of lawyers and parliamentary agents while any bill would be in process. These work elements have been provisionally programmed into the 5 year project plan.

4.1.2 Business Plan

Based on the anticipated timescales for any new Act to implement governance change, a major review and update of this Business Plan will be required in 2024/25. That review will update and revise targets and timescales for all those elements that would be impacted by any new powers and governance arrangements.

4.1.3 Business Continuity Plan

The current draft business continuity plan is in need of further review to provide a working guide for the organisation in the event of a serious unexpected incident (e.g. fire, flooding, or sudden loss of a senior member of staff).

The Trust was fortunate in having put measures in place at the outset of the Covid pandemic in advance of full lockdown (eg home working functionality and delegation of necessary Board decisions to a Committee). These factors together with other key lessons learnt over the past 18 months from measures put in place to cope with the Covid Pandemic need to be carried forward into a revised and updated Business Continuity Plan.

4.1.4 Policy reviews

The Trust has a number of adopted policies covering a wide range of topics and issues. These are essential in providing a clear position statement and facilitating a consistent approach by both Trustees and Staff across a diverse range of management issues.

Many have been revisited and updated over the past 5 years and this work needs to continue over the life of this plan. A review of the schedule of policies, along with prioritised timetable for their review needs to be undertaken as part of the planned work.

Governance - What we aim to have achieved by 2027

Required actions	Target by 2027
The current Acts are consolidated and modernised as identified by the Board	We have a set of clear, unambiguous governing documents which enable MHT to operate effectively in the 21 st Century, with powers appropriate to enable the organisation to achieve its objects.
Review the Business Plan in 2024/25	The Business plan is relevant and incorporates all elements of any new governance scheme that may have been approved through Parliament
Update the Business Continuity Plan with lessons learnt from the Covid pandemic	We are prepared and able to continue to operate effectively in the event of a major unexpected occurrence
Maintain the regular review of existing policies to ensure they are current and fit for purpose	We have a full suite of up to date policies to cover the needs of the organisation.

4.2 Legal

Separate to the update of the Malvern Hills Acts are a number of other legal issues which need to be addressed over the coming years.

4.2.1 Boundaries

MHT owns or has jurisdiction over a large area of land. That land has been variously gifted to or purchased by the Trust, or jurisdiction has been granted over it by one or other of the Acts of Parliament. The Trust has previously undertaken to voluntarily register all the land it owns with the Land Registry. Despite this, boundary queries still arise on a regular basis, either in the registered land holding or elsewhere from deed maps, and these require investigation and where possible need to be resolved. It is not possible to comprehensively track down every anomaly in advance, so is important to address these queries as they arise and to determine accurately the boundary of the Trust's land.

Alongside but separate to the determination of boundary issues, is work to mark effectively the Trusts landholding. Some work to locate and document old boundary markers has been undertaken by volunteers in previous years but this work needs to be expanded to survey and, where appropriate, update boundary markers on the perimeter of our land holding.

4.2.2 Byelaws

A review of the byelaws, last updated in 1999, was planned during the life of the previous Business Plan. This was delayed pending implementation of the governance reforms.

There is a growing need to update the byelaws to make them appropriate to the various issues arising from modern society and how it affects the land under the Trust's care. This work will still need to be undertaken, but is dependent on the work to update the Malvern Hills Acts.

Byelaw breaches are generally dealt with in the first instance by officers through education and advice, rather than enforcement. Some breaches such as encroachment onto Trust land may warrant more immediate enforcement action. The Trust's powers of enforcement are limited and inflexible – the Trust can only seek enforcement by taking court proceedings. A more modern and effective method of enforcing byelaws would be through the use of Fixed Penalty Notices, but this would require the appropriate powers to be granted through an updated Act of Parliament (see above).

4.2.3 Legislative compliance

MHT is required to comply with the full range of legislation that applies to its operations. The most relevant pieces of legislation are set out in the appendices.

The Trust's officers need to keep up to date with changes in all relevant legislation, and implement appropriate changes to plans and procedures to recognise them. When any such changes might apply to the Trust is impossible to accurately plan for. However, by

maintaining regular vigilance, and by using appropriate external professional advisors (in areas such as employment law, health and safety, GDPR, finance etc) the Trust is able to identify potential changes and can make appropriate changes to its systems in a timely manner.

4.2.4 Health and Safety

The health and safety of staff, volunteers, contractors and visitors is of paramount importance. Whilst steps have been taken in recent years to improve and upgrade our systems and ensure that all relevant standards are met, there is an ongoing need to review our provisions, to renew them in light of any changing standards, and ensure staff and volunteers receive appropriate training.

As well as maintaining a logging system for regular checks and system certifications, the Trust has an external safety advisor who undertakes independent inspections and advises on appropriate actions to maintain compliance. These systems all need to be maintained throughout the period of this plan, and wherever appropriate changes and improvements adopted.

4.2.4 Licences and agreements

A schedule of all existing leases and licences already in place provides appropriate advance notice of any agreement termination date, ensuring that they are reviewed in advance of any expiry or change as appropriate. This system needs to be maintained in future years.

The current lease on St Ann's Well will expire in Year 1 of this plan and will require external advice in order to put in place a subsequent lease.

Legal - What we aim to have achieved by 2027

Required actions	Target by 2027
Identify and resolve boundary issues as they arise	All known boundary issues have been dealt. The position of boundaries where there is no defining boundary feature have been marked
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.
Review the 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
Monitor register of leases and agreements.	All licences, leases and agreements are up to date, with MHT interests properly secured.

4.3 Monitoring and controls

4.3.1 Carbon audit and Environmental Appraisal

The Trust needs to take responsible and positive steps to restrict its own contributions to global climate change and the biodiversity crisis. With a national UK carbon zero target set by Government for 2050, there is an increasing need to ensure materials, equipment and systems will meet both current and future standards.

The first priority is to undertake a full Carbon Audit of the organisation, to identify what the carbon output of the Trust's operations is, where the biggest improvements can be made, and set a benchmark for future assessments. The wider environmental performance of the organisation then needs to be assessed and a phased plan for future implementation of measures to limit the organisation's impacts put in place. This will consider not only the carbon levels, but also wider environmental impacts such as noise and soil compaction caused by machinery, as well as which operations are the most environmentally beneficial.

Some carbon reduction measures have already been put in place, including:

- changing the Trust's investment guidelines to exclude investments in fossil fuel, mining and quarrying companies
- using electricity from non fossil fuel sources
- installing double-glazing and energy efficient lighting to both Manor House and Top Shed

Additionally, there are several other steps which have already been planned for, including.

- increasing tree and woodland cover where appropriate across the estate
- adopting low or net zero carbon systems of working – eg changing to hybrid or electric vehicles and machinery (eg brush cutters, chainsaws and other appliances) when current machines reach the end of their working life

There will need to be ongoing evaluation of the suitability of available low carbon options. It may now be realistic to replace the current fleet of vans with electric vehicle but there is very restricted availability of low emission models of pick-ups currently on the market, and no truly low-emission alternatives on the near horizon for vehicles such as tractors.

Additional measures that will need to be considered including,

- installation of appropriate energy saving measures (insulation, air source heat pumps) as well as adding energy-generating systems to Trust buildings, eg solar panels to the roof of Manor House
- installation of publicly accessible electrical charging points in car parks
- adopting schemes that encourage staff, volunteers and visitors to access the hills by means of low carbon transport

However, some of the measures identified above (eg installation of electric charging points in the car parks and energy generating systems that sell energy back to the grid) would only be possible by legal change such as through an updated Act of Parliament. Consequently, some of the measures set out above will not be available to use until after such a power is in place.

Further measures beyond those already in place need to be considered. A full assessment of environmental impacts of our operations (including factors such as soil compaction, drainage and noise impacts from machines) will need to be undertaken to inform future acquisition of materials, machinery and services

4.3.2 Land use and the planning process

Planning applications are monitored by staff on a weekly basis and this work needs to continue as part of the Trust's core responsibility to protect the land under its jurisdiction. Where appropriate comment or register of an objection to an application is lodged with the planning authority, and the applicant is sometimes contacted where for example access will be required over Trust land.

The existing policy on responding to planning applications needs to be reviewed. This was deferred from the last Business Plan and should be undertaken within the first two years of this plan.

4.3.3 Record keeping

Over the past 5 years the systematic referencing and filing of all deeds, licences and agreements, correspondence with neighbours, photos, maps and plans has been updated and maintained thanks to the dedicated efforts of a small group of regular volunteers. Due to Covid impacts volunteer support for this area of work all but disappeared in the last 2 years and there is currently a need to re-energise this work, to update and develop the filing system.

The effective archiving of digital is an ongoing maintenance requirement that will need continued effort over coming years.

Installation of a new server along with systems to improve GDPR compliance, and appointment of an external GDPR have all been implemented in the last 5 years.

All of these systems require regular review.

Integration of the Trust's paper records of deeds and documents onto its GIS system is a project that still needs undertaking, but achieving this will require a dedicated and skilled volunteer or staff member.

4.3.4 Incident Reporting

A system for recording all reported site incidents is in place and is to be maintained. Incidents are recorded with date and time, location, crime number if relevant and

photographic records where available. This system is a valuable tool in monitoring incident levels throughout the year and flagging internally and with external agencies where patterns of incidents recur. This in turn steers development of any proactive steps to prevent escalation. Examples include fly tipping hotspots, vandalism and substance misuse, failing utility services, and damage caused by erosion.

4.3.5 Complaints and compliments

A complaint and comment logging procedure has been implemented, and alongside those a number of internal policies (eg Safeguarding policy and Complaints procedure) are also in place.

These procedures need to be appropriately reviewed, to ensure they reflect relevant legal requirements and best practice.

4.3.6 Risk Register

In compliance with Charity Commission guidance, MHT maintains a Risk Management Register that identifies and classifies the key risks in all operational areas of the organisation. This register is reviewed by staff and trustees on a regular basis as part of the annual audit process, to identify any changing circumstances that might impact on the organisation. Updates are regularly reported to Board meetings.

Continued updating of this register needs to be maintained throughout the life of this Business plan to ensure staff and trustees are fully aware of the risks the organisation faces.

As the balance of risks changes over time, the Trust's current and future operations may have to be changed and adapted. It is therefore important that the Business plan retains a degree of flexibility and is reviewed annually in light of the Risk Management Register.

Monitoring and controls - What we aim to have achieved by 2027

Required actions	Target by 2027
Undertake a carbon audit of the Trusts operations, and update as appropriate	There is a quantified measure of the Trust's carbon emissions, measured on a regular basis.
Review all machinery and equipment at time of renewal for carbon emissions and to select lowest possible carbon footprint whilst taking into account the suitability of the equipment for the work required.	Machinery and equipment acquisitions have contributed to a reduced nett carbon emission of the organisation.
Undertake an Environmental Appraisal of the organisation and monitor its effectiveness through implementation.	The organisation has adopted low environmental impact processes wherever appropriate.
Continue to monitor planned developments that may impact on the Trust's land	Appropriate comments have been made on all planning applications which might have an impact on the land under MHT jurisdiction.
Review the policy on responding to planning applications	The policy has been updated and is appropriate
Maintain efforts to put all digital records into integrated filing system with paper ones	Digital records are maintained in an orderly way using a standard searchable system.
Mapping system is updated to include access to historical deed maps	Data relating to land holdings is available on the GIS system
Maintain incident Recording system	An accurate record of incidents is held and used to steer the operational management of the land and byelaws.
Maintain the system for dealing with complaints, comments, and compliments and tracking progress	Complaints are dealt with in accordance with the policy and repeat issues are identifiable and addressed.
Regularly monitor the Risk Management Register so that it is kept up to date by staff and trustees.	<p>Risks to the organisation have been regularly reviewed by Staff and Board.</p> <p>Contingency plans are prepared in a timely manner and plans changed to mitigate and reduce those risks</p>

4.4 Administration and processes

The effectiveness of MHT's day-to-day operation is greatly determined by the efficiency of its general administration systems. This is carried out by staff using various forms of software and hardware. There is a need to maintain adequate staff levels to deal with the administrative load on the charity as well as ensuring IT systems are up to date and working effectively. Staffing capacity and IT are covered elsewhere in this plan whilst significant steps needed to the IT provision are covered in section 2.5. There are however additional upgrades of other administrative processes and equipment needed in the coming 5 year period.

4.4.1 Equipment upgrades

The current phone system is dependent on ISDN connection which is to be phased out in 2025. It is planned to replace the system with an IP based system with roughly the same running costs. This should provide a more flexible and up-to-date phone system for the future. Replacement cabling will be need to be installed in 2022 or 2023.

An effect of this change may be that the alarm systems to some of the Trust's buildings will need to be upgraded or replaced. This will also need to be implemented before 2025.

Another planned replacement will be the photocopier / printer / scanner which is used by all staff teams. This is expected to require replacement in 2023/4 with a suitable specification machine.

Administration and processes - What we aim to have achieved by 2027

Required actions	Target by 2027
Replace phone system	New equipment is in use is up to date and compatible with available phone connectivity
Update or renew alarm systems	Machinery in use is up to date and compatible with available phone connectivity
Renew printer / scanner / copier	Equipment is to current standards, reliable and cost effective