

DORSET WILDLIFE TRUST STRATEGIC PLAN 2017-2020

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Dorset Wildlife Trust

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Protecting **Wildlife** for the Future

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Preface

Dorset Wildlife Trust (DWT) is the leading charity dedicated to nature conservation in Dorset. We have grown from small beginnings in 1961 based entirely on voluntary effort, to now having over 27,000 members, 43 nature reserves, 5 visitor centres and a thriving programme of outreach with communities and land and sea managers. More than that, DWT has as it has developed as a business and now is amongst the largest 2% of Dorset businesses in terms of employees and turnover. DWT has never though lost its volunteer ethos, and the charity thrives on the efforts of thousands of volunteers and supporters.

Our strategic plan for 2017-20 faces up to a time of great uncertainty and turbulence in the outside world, with the impacts of Brexit on the natural environment very much uncertain at the time of writing, presenting both great risks and significant opportunities. DWT, whilst a local Dorset-based NGO, must play its part in influencing to benefit nature, through our local experience and evidence, and as part of the network of Wildlife Trusts nationally.

This is also a time where not only is the environmental sector under greater and greater pressure to provide evidence to underpin decision-making, be that from justifying designation of Marine Conservation Zones to demonstrating that protecting wildlife is a benefit to Dorset's economy, but there is also in parts of the political environment and the media a tone of scepticism about the role of "experts" and a feeling that they are disengaged with grass-roots opinion. Further to that there are also strong views about charities, both in terms of their voice when we speak up against policies or decisions that are harmful to our mission, and in terms of fundraising, with greater scrutiny on the methods used and the need for all charities to behave ethically towards potential donors. DWT needs to meet these challenges simultaneously; to both be informed, credible and knowledgeable and to be in touch with communities and our supporters; and to both raise the funding that we need to achieve our vision and to retain and grow the support of Dorset's residents for our work. There is every reason to believe that we can do this, and as an organisation built on volunteer and community effort, our very ethos means that we have a head start.

This three year strategic plan faces up to the challenges we face, and places the emphasis on addressing them. It therefore sets a change in tone from previous plans, to focus on building our support base, demonstrating our impact and increasing our influence on decisions that affect Dorset's natural environment, whilst never losing touch with nature and the special places which inspire us all to take action for wildlife.

Imogen Davenport, Director of Conservation

February 2017

1. Dorset Wildlife Trust's Strategy

1.1 Our Vision is Dorset rich in wildlife for everyone.

1.2 Our Mission is to champion wildlife and natural places and to inspire people to value and take action for nature.

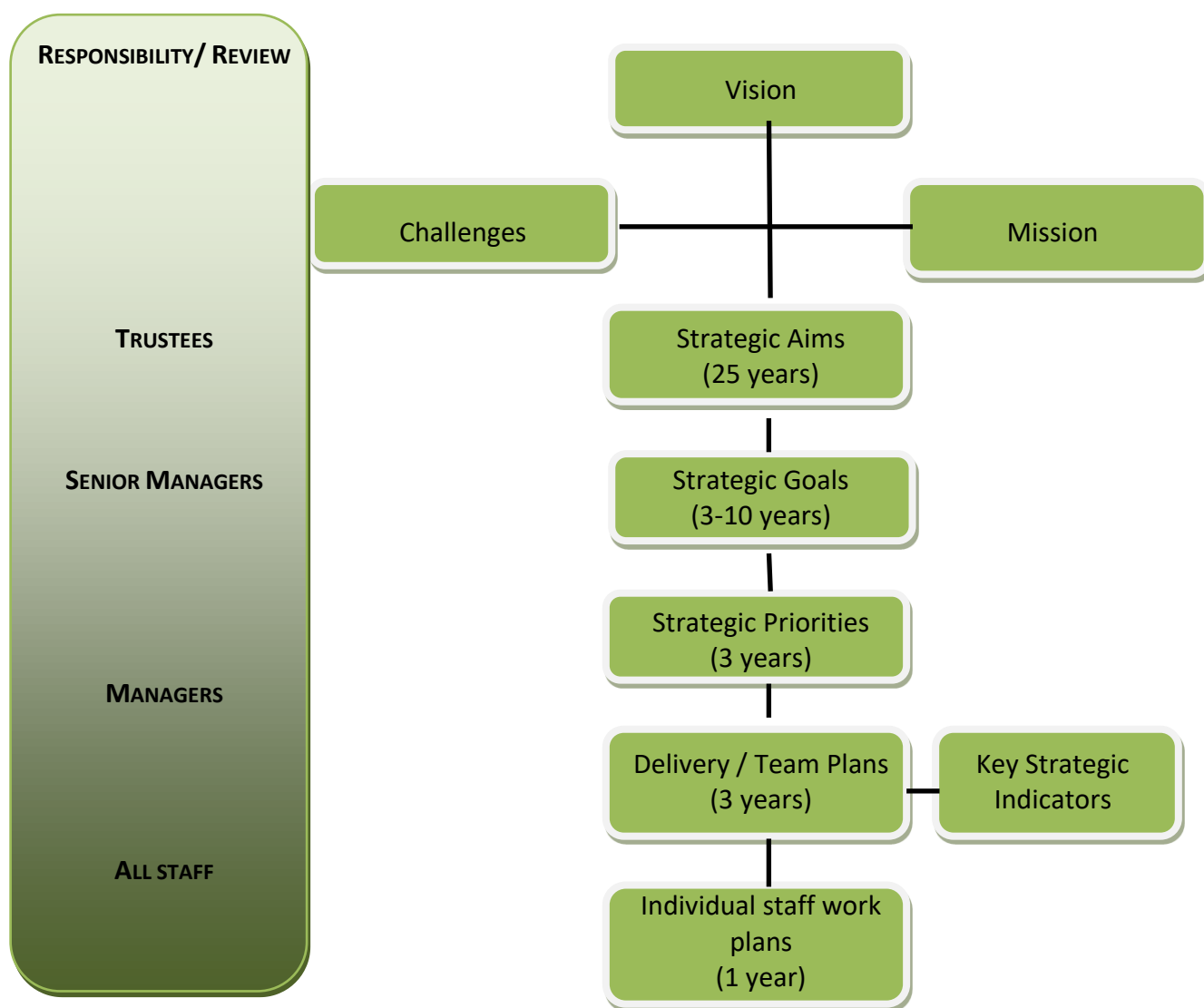


Figure 1: Strategic planning framework showing how the different elements are linked and the primary (not exclusive) responsibility for them within DWT.

1.3 Aims

Our five 25 year strategic aims are in-effect what we do:

1. *Living Landscapes & Living Seas*

Restore, reconnect and recreate wildlife habitats within large-scale areas for both wildlife and people.

2. *Wildlife Champions*

Influence policies, decisions and plans to safeguard and enhance wildlife.

3. *Inspiring and Involving*

Increase empathy for, knowledge of and involvement with wildlife.

4. *Promote Sustainable Living*

Make the connections between wildlife and the way we live to avoid compromising the environment for future generations.

5. *Efficient & Effective Organisation*

Adopt practices which enable DWT to function smoothly and adapt to changing circumstances.

1.4 Strategic Goals

These are our medium-term goals (3-10 years) and indicate the main areas of work. These were first established in the 2010-13 Strategy, were reviewed with minor revisions for 2014-17 and have now been reviewed with more major changes for 2017-20, and reduced in number. Goals 1-6 are focused on our delivery and external engagement and goals 7-10 are focused on our members, supporters, resources, and management.

1. Managing Habitats. Manage, enhance, restore and reconnect habitats to meet biodiversity targets and increase resilience to climate change, on our own nature reserves and working with other land and sea managers.

2. Influencing Land and Sea Management. Working in partnership with others, influence land and sea management and the work of individuals and organisations within and outside the conservation sector to the benefit of wildlife in Dorset.

3. Providing Evidence. Gather and present high quality, robust information to inform and support our conservation work.

4. Enabling Action for Wildlife. Work with volunteers and Dorset's local communities to enable people of all backgrounds and abilities to play an active role in supporting DWT and making a difference for their local wildlife.

5. Raising Awareness. Increase awareness of DWT and nature conservation and enable more people to learn about and enjoy nature in Dorset.

6. Connecting with Sustainable Living. Promote the benefits of integrating nature conservation into Dorset's economic and social activities.

7. Members & Supporters. Build and sustain our membership and supporter base and extend opportunities to play an active role in the work of DWT.

8. Securing Funding. Diversify and strengthen funding sources, prioritising secure, sustainable income sources.

9. Managing Effectively. Smooth and efficient management and administration of DWT's work, to ensure financial stability and a safe, productive and fulfilling working environment for staff and volunteers.

10. Governing our Charity Soundly. Effective and efficient oversight and governance of DWT to enable the best possible delivery of our charitable objectives.

1.5 Format, purpose & audience

This strategic plan sets out the aims, direction and strategy for Dorset Wildlife Trust (DWT) for the next 3 years from 1st April 2017 to 31st March 2020. The core business of DWT remains unchanged – that of wildlife and natural places – but this plan describes all elements of the business required by a medium sized organisation run in a safe, stable, efficient and effective way.

This document has been written in a technical style because it is aimed primarily, but not exclusively, at staff and trustees who work within the organisation. Members and volunteers may also find the plan of interest as it is not confidential.

This plan not only gives direction and informs our work within DWT but also forms the basis for dialogue and collaboration with our partners in and outside of the county. It covers 3 years of work both because this is a realistic period to predict activities, and also because it allows performance to be measured at the end of the period. It updates and replaces the previous DWT Strategic Plan 2014-17.

1.6 Background to DWT

DWT is the county's leading charitable membership body committed to ensuring that there is a secure future for Dorset's nature - its distinctive wildlife and natural spaces. DWT uses a sound evidence base, influence and wide practical experience of land management and marine conservation to inspire, inform and engage people in Dorset. By providing guidance, we help others to carry forward policies that are beneficial for nature within both the rural and urban economy. DWT provides opportunities for everyone to appreciate and understand Dorset's unparalleled natural heritage, and strives to ensure that future generations will be able to enjoy a quality of life at least as naturally rich and diverse as we have now.

DWT was founded in 1961 as a charity (then Dorset Naturalists' Trust) to promote nature conservation through the study, monitoring and management of nature reserves. Since then our work has extended to influencing others who affect our wildlife, and to promoting a better understanding and appreciation of wildlife by the public. We offer advice to landowners and managers; we stand up for wildlife in the fight to prevent inappropriate development; and we work to influence decision-makers right up to central government level. Over the last few years DWT has created a sound financial base, an effective and motivated workforce, and continued to develop opportunities for volunteering.

DWT's membership has grown to around 27,000 individuals (13,500 households), providing a fairly secure base of unrestricted income and establishing DWT as the largest nature conservation non-

government organisation (NGO) in Dorset and the 4th largest Wildlife Trust in the UK (by unrestricted funding). A similar growth has been achieved in other counties, making The Wildlife Trusts (TWT) an influential partnership of 47 Wildlife Trusts across the British Isles. DWT works especially closely with the other Wildlife Trusts in the South West, who together have formed South West Wildlife Trusts (SWWT) and established a number of joint initiatives.

1.7 DWT's business challenges

What we do is too important to be a niche issue. The natural environment has to be a major priority in Dorset and nationally for us to be effective in the future. To achieve what we want for wildlife and the places they live in, we have to think broader but stay true to our core business aims.

DWT's future depends on our ability to achieve success in four main areas:

- Relevance.
- Influence
- Profile
- Impact

Relevance. The work of DWT has to be relevant to a range of people with different priorities and issues, whether they value wildlife in its own right, rely on a healthy natural environment for their livelihood, or have an impact on wildlife through their activities.

Several other agendas overlap with the natural environment such as land use planning development, tourism, farming, fishing, forestry, health and welfare, sport and leisure, art and culture, community integrity and more. A healthy natural environment makes a positive contribution to thriving local communities and vibrant economies, and we need to make this inter-dependency better understood and accepted in other sectors, and work with these sectors on areas of mutual interest.

Influence. As an NGO we do not make wide-ranging decisions affecting the environment. That is not our role. DWT's job is to ensure that the right decisions are taken. In that way the experience we have gained from our historic aim of managing reserves, which form only 0.5% of Dorset's area, can be applied to influence the management of a much greater area, ensuring that Dorset as a whole becomes richer in wildlife. We move from managing less than 1% of the county to potentially influencing more than 80%.

Our ability to influence depends on the quality of our work and advice, scientific credibility, political astuteness, trust and reliability as a strong player and valued partner. Our membership now represents about 3.8% of Dorset's population, which makes us a force to be reckoned with, though we aim to increase our reach into Dorset's population further.

Profile. It is a fact of life that to achieve influence, remain relevant and to secure sufficient support we need profile. Profile is associated with recognition, brand, results and relevance. We have to engage for nature in those issues that are important for the county.

With profile and engagement comes a need to balance possible approaches. We must retain a position that supports our own core business aims relating to wildlife, and not step over into areas for which we do not have expertise. On the other hand in order to build profile we may need to engage with issues relating to conservation that we have traditionally remained quiet about in order

not to lose support or to avoid justified criticism. To raise our profile effectively and successfully our engagement must be based on sound, robust, credible information and where possible scientific data.

Impact. DWT has to ‘punch above its weight’. Though classified by Charity Commission as a large charity, we are a relatively small organisation with a great many things we need to do. We need to employ several tactics to assist in increasing our conservation and indeed business (such as membership outreach) impact:

- Focus – doing a limited number of important things well rather than engaging in many things.
- Strategy – ensuring that we chose those areas of work that will give the greatest impact for the available resources.
- Partnerships – we cannot and should not do everything required, so we need to partner with a range of organisations and individuals with overlapping aims and complementary skills.

1.8 Dorset’s biodiversity challenges

Dorset’s world renowned geology is reflected in its varied range of terrestrial and marine habitats, including heathlands, chalk downland, clay vales, tide-swept offshore reefs and sheltered saline lagoons. It is one of the richest counties for wildlife in England but has suffered many losses in the last 50 years as a result of human activity or neglect. Despite some slowing or reversal in trends, losses continue. Human impacts on the marine environment are largely hidden, but should no longer be ignored. Dorset contains strongholds for many nationally scarce or threatened species, such as the sand lizard, Bechstein’s bat, nightjar and Adonis blue butterfly. Many south-western marine species reach their easterly limits in Dorset’s waters.

Dorset has around 140 nationally designated wildlife sites - Sites of Special Scientific Interest (SSSI), a number of these also hold international nature conservation designations. Some 7.8% (20,900 hectares) of Dorset land holds a statutory nature conservation designation¹. In the terrestrial environment, the condition of SSSIs has been assessed, and at the time of writing about 40% of ‘management units’ were in ‘favourable’ condition, and another 49% ‘unfavourable’ but recovering. This recovery has been aided through better legislation for SSSIs, and the availability of grants for management. Any weakening of legislation however, or reduction in funding for management could set conservation efforts back.

About 26% of the marine environment (out to 12 nautical miles – an area covering almost the same size as Dorset’s terrestrial boundary) now holds some sort of statutory protection – through Marine Conservation Zones, European Marine Sites and no-trawl zones. However some of these measures are yet to prove that they can be fully effective at arresting declines in habitat quality and in marine species. Also within these sites, not all parts are protected from damaging activities, only those which are listed as ‘qualifying features’, so there remains a strong need to monitor changes and stand up for marine wildlife and sustainable management practices.

Dorset holds significant areas of priority habitat and species outside of statutorily designated sites. Some non-marine sites and habitats have been recognised as Sites of Nature Conservation Interest (SNCI). These are a vital component of our county’s wildlife habitats, and represent sites which are at least of Dorset-wide importance. Some are of national importance. The SSSI series aims to cover a representative sample of the most important habitats, rather than a complete set. At the time of

¹ Dorset State of the Environment Biodiversity Indicators report, March 2016, Dorset Environmental Records Centre.

writing, there are 1,292 SNClS in Dorset, covering 4.6% (12,287 hectares) of the county. Currently around 42% of SNClS are thought to be in 'good maintained' or 'good improving' management condition; 16% are assessed as in 'poor' or 'declining' management condition. Again land management grants are critical to maintaining SNClS, and reductions in funding could have a major negative effect on the quality of their habitats. Conservation of these priority habitats is dependent on there being supportive policies to back up voluntary effort.

Dorset's wildlife still faces threats from the increasing pressures for development. Demand for built development, be it for housing, transport, energy, waste or minerals, can, if not carefully planned, put at risk areas where wildlife flourishes. In the wider countryside we can expect changes in agricultural policy to create more opportunities and challenges for conservation management. In the longer term the impact of climate change on habitats and species could be very significant, and we must take advantage of measures to adapt to this change and mitigate the consequences.

We also have to adapt to changes in the way government operates locally, regionally and nationally. This reflects changes in national government and its policies. We will work with our partners in Dorset and beyond to influence local and national decisions and to work with local partnerships, such as Dorset's Local Enterprise Partnership (LEP) and Local Nature Partnership (LNP), to deliver sustainable solutions to local problems.

1.9 How we work at DWT

Our Values

Everyone at DWT, our staff and volunteers, share common values. We:

- Respect and value each other's skills, energy and commitment.
- Are open and transparent in the way we work.
- Act honestly, fairly and with integrity.
- Use resources efficiently, wisely and safely.
- Work in partnership - to increase our effectiveness.
- Are inclusive - working with people of all ages, abilities and backgrounds.
- Value volunteers - without whom much of our work could not be done.
- Build sustainability - into all our activities.
- Are responsive - to the views of our members, and the wider community.
- Are objective, scientific and professional.

Our Guiding Principles

In all our work we will need to focus on our four guiding principles as we plan and undertake activities that will make a positive difference to the biodiversity of Dorset. **All of these will be targeted to the key areas, individuals and activities where they can be achieved most effectively.** They are to:

- **Achieve more wildlife benefits** – this comes into the following three principles but must also be the ultimate reason for our strategic plan and because we need this foundation in order to achieve all our aims.
- **Engage others** – from key decision-makers to local communities who will work beside or instead of us.
- **Build profile and influence** – both for DWT but also for wildlife and the natural environment.
- **Diversify and grow our income** – so we can do more conservation and be less at the mercy of external grants.

ALL of our work – traditional or otherwise – will need to deliver on at least two of those four guiding principles. This will mean greater utilisation of our time and assets and ensure that our many successes contribute to more than one priority. We view our activities for the next 3 years through the lens of these four guiding principles and will take an objective, quantifiable approach to evaluating what we will need to do.

As a means of embedding the guiding principles into our work, and to help achieve some critical successes, five Keystone Programmes have been adopted which cut across many strands of DWT's work:

- Enabling grass-roots wildlife action (the Wildlife Action Hub);
- A wildlife discovery centre;
- Commercial income generating activity;
- Brownsea Island Visitor experience;
- Supporter Development.

These will be developed and implemented through the 3 year period of the DWT Strategic Plan 2017-20.

2. New challenges for 2017-20

There are particular, new and urgent challenges that now face DWT and the natural environment which means that DWT's 2017-20 Strategic Plan has a change in focus from the previous two plans. There are five reasons why a change of direction is required:

1. To raise the importance of the natural environment in decision-making at all levels and in every-day life.
2. A need to better adopt a Living Landscape / Living Seas approach that engages more people and organisations.
3. To gain greater influence and impact.
4. To be more effective in the use of our resources and assets.
5. To broaden our revenue streams and supporter base.

All five reasons are inter-related and success in one leads to gains in others (Fig 2.). The change of direction is not a radical and risky departure from our previous one, but does represent a significant evolution, as opposed to revolution, towards focussing on what DWT is already achieving much success with.

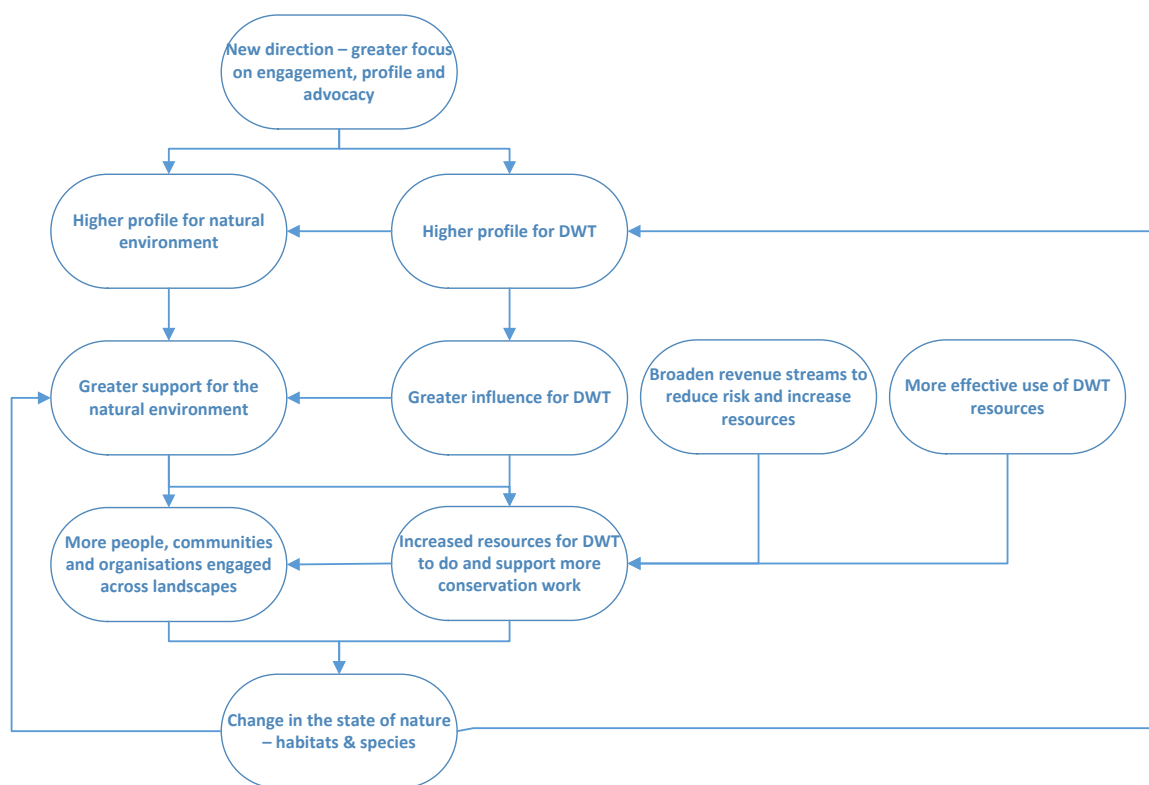


Fig. 2: Multiple benefits resulting from the change in direction.

Reason 1 - reversing the decline

Despite our best efforts and those of the wider conservation movement, we struggle to maintain the importance of the environment in decision-making and in the minds of the general public. Intensive agriculture, commercial over-fishing, building development, funding policy, Brexit,

political will, government policy, local authority cuts, pollution and climate change all represent challenges to nature.

We are seeing that nature and wildlife are not priorities for government and do not commonly feature in key decision-making. We see this in examples such as: a push for major infrastructure projects without accompanying environmental benefits; a lack of connection with nature by the population especially children; threats to reduce environmental protection legislation exacerbated by Brexit and the loss or watering down of wildlife protection currently provided by EU Directives.

In a period of challenging economic times, environment slips down the agenda replaced by short-term economic benefits and growth, which conversely is just when protecting our natural asset-base and productivity is most important and valuable.

We have had many conservation successes and the situation would have been far worse without our interventions but we are not gaining significantly under pressure from these various threats. For the vast majority (95%) of people living in Dorset, wildlife conservation and DWT remain irrelevant. So we must try a different approach building on what we have learnt and focussing on the elements of our work that we know will be successful. The approach needs to be one that is more in tune with modern challenges and is better able to adapt quickly to modern opportunities. What we need to do now is to win the hearts and minds of the population, to leverage support by overlapping other people's agendas with ours and to be politically astute (though not act in any party political way).

In doing this we cannot though leave behind our role in practical action which achieves direct wildlife enhancement and gives credibility to our messages, examples for others to emulate, and places where people can experience nature. We are well placed to lead the changes on the ground that are needed, but we will always be too small to do everything ourselves.

Reason 2 - engaging hearts and minds

TWT and DWT's Living Landscapes / Living Seas approach commits us willingly to scaling-up our ambition and our activities. Fundamental to this concept is the awareness that we cannot own all landscapes or any of the sea. Even if we could, we need to take people with us, not merely impose conservation. Once we take people with us we can share the tasks needed and the support required. Whole landscapes support nature, for whatever agenda, and we gain greater success through ensuring joint ownership of our future natural health and prosperity. An ecologically coherent network of protected and high value sites amongst the sensitively managed landscape and marine environment is only possible if we engage, advocate, influence and trust people far more than previously.

If we are to get meaningful changes to the state of nature we have to engage a far wider range of groups, organisations and individuals than we are currently doing. Though we have many partners, there is only one of us with 75 staff, but hundreds of other organisations or thousands of people.

We will be careful though not to throw the baby out with the bathwater as we have a track record in innovative on-the-ground conservation projects, many of which have achieved outstanding conservation results and also brought in significant funding and raised profile. We aim to make the conservation and restoration of the natural environment more relevant to more people and more agendas.

Reason 3 – to gain greater influence and impact

One challenge we have is that conservation gains can be ephemeral. People, organisations and government that support us now may change in a new regime or generation. The only way currently to ensure continuity and stability for nature is to buy land or to do work ourselves. We can however never realistically own enough land or do enough work to safeguard wildlife and the health of the countryside. So we must engage with those, for example, that do own the majority of land or have influence at sea.

We will use inspiring and informative examples of conservation successes, often from our own work, to justify and motivate others to take action, be that either practical or policy related. Success and understanding will then generate further success and prove the value of the approach. Further, in addition to the good case studies we already have, we need to improve our evidence base through publicising results from our own and others' work to develop robust, clear, useful policy. This policy will then be used to influence change at a much wider level than individual sites.

Influence will not only increase our impact, it will also raise our profile and credibility leading to more resources and support.

Reason 4 – be more effective in the use of resources

In order to achieve all of the above with limited resources, we have to get more proficient at using our work to achieve multiple aims linking up what we currently do better and prioritising work that provide these multiple benefits.

There is a parallel track approach for both conservation or organisational outcomes (Fig. 3a). For example (Fig 3b & 3c) if we have a successful conservation project, we use the lessons the project teaches us to determine the right sort of management needed (i.e. policy development) and then use that knowledge to advocate a roll out to other sites or change the policy of a higher level organisation.

Similarly for organisational aims (Fig. 3d) we need to be linking our good stories in the field to show what can be done to make a difference and then seek funding support.

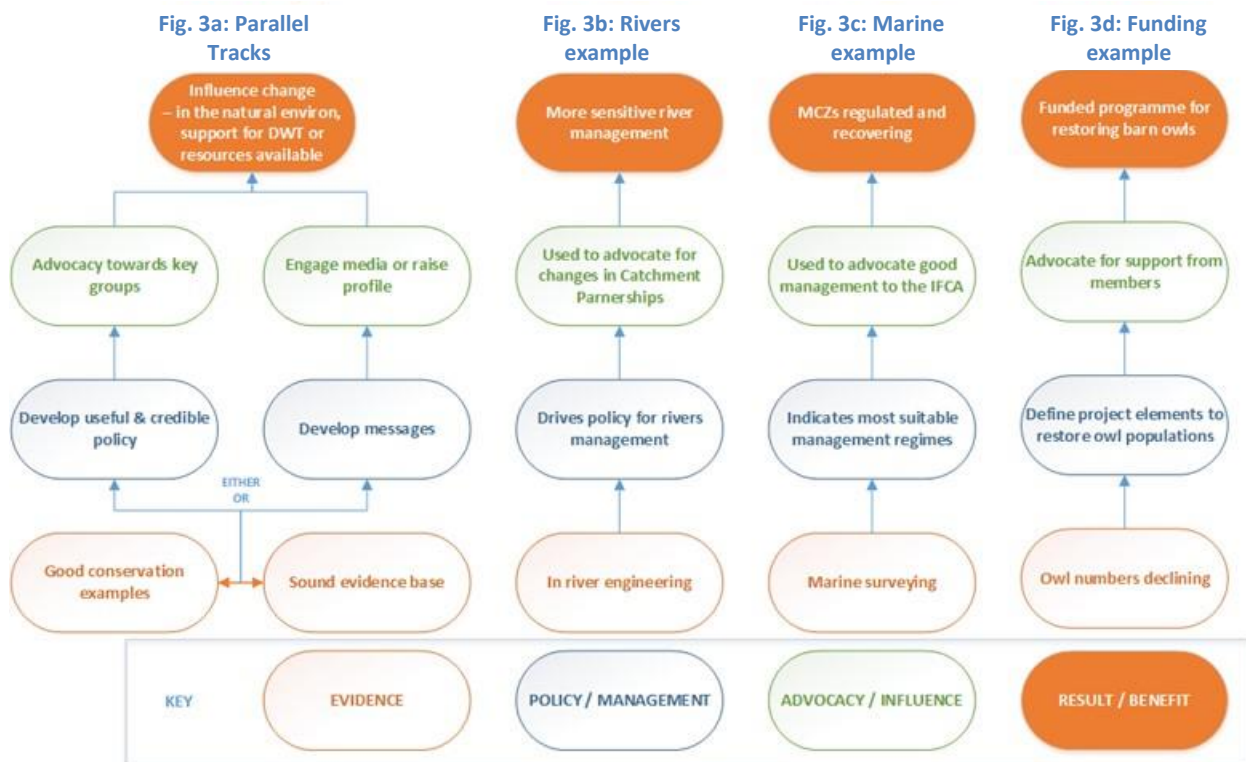


Fig. 3: A more effective use of resources and our successes.

Reason 5 - broaden our income

DWT needs to urgently broaden its income base, not only to have a chance of growing our income, but also to reduce the risk of it declining and make income more stable.

Grant income targets are becoming harder each year to achieve due to increased competition. Competition will likely increase still further due to Brexit as European funds dry up. Competition from academic institutions will be particularly challenging. Associated with this are land stewardship grants from the Common Agricultural Policy which are so important to our work both within our nature reserves and out in the wider landscape where conservation minded landowners need the support.

Gift and legacies are vital for our work and, though we can increase the likelihood of future gifts through increasing and engaging our supporter base, they cannot be predicted in the long-term.

We need therefore to be more self-reliant in our incomes to avoid the vagaries of the outside world. Of course we will never be quarantined from external events, but where possible and appropriate we need to look for opportunities to generate our own income. We will be using our assets and successes more often to generate support, some of which may be financial. Our fundraising needs to work within our four guiding principles and engage people and be on message with our conservation aims. We need to be using our fundraising and marketing to build our brand and credibility, so encouraging further support in another virtuous circle.

3. Business elements

3.1 Structure, governance and management

The charity group consists of The Dorset Trust for Nature Conservation Limited (a company limited by guarantee and having no share capital), and a subsidiary trading company, DTNC (Sales) Limited (a company limited by shares). A separate Memorandum and Articles of Association govern each company. The charity operates under the working name of Dorset Wildlife Trust ("DWT").

Trustees are elected by members at the Annual General Meeting. Council may appoint additional Trustees to fill vacancies between AGMs, but such persons must face election by members at the next AGM. DWT endeavours to maintain a balance of skills and expertise when seeking new or replacement trustees. Officers of DWT (Chairman, Vice Chairman, Honorary Treasurer, and Honorary Secretary) are appointed by Council from those elected by members.

DTNC (Sales) Limited, the trading company for the group, is primarily involved in the sale of goods, courses and other services, and with commercial activities. Profits earned by the trading company are passed to its parent company, Dorset Wildlife Trust, as a gift-aided charitable donation on an annual basis.

Directors of DTNC (Sales) Limited are appointed by the Council of DWT.

The DWT's organisation can be summarised as follows:

- The Council of Trustees meets every quarter (usually March, June, September, December) to review performance and set DWT policy and strategy.
- Council is supported and advised by policy sub-groups, namely:
 - Finance and Property Panel
 - Personnel and Remuneration Panel
 - Conservation Panel
 - Marketing Panel
 - Members Panel
 - Health and Safety Committee (see section 3.7)
 - Governance Panel
 - Commercial Board (see section 3.9)
- In addition DWT has a number of joint volunteer/staff groups and panels to provide advice on either an ongoing basis (for example SNCI Panel, Agriculture Group) or, as needed, to plan special events or advise on a one-off or time limited basis.
- The Chief Executive, who is delegated responsibility for financial and operating performance has staff teams for conservation, fundraising & marketing, operations & development, and finance.
- Local Groups of members who organise events for members in their area.
- Volunteers who help in a wide variety of ways, practically and with administrative tasks.

3.2 Financial reserves policy

The Trustees believe that, because of the uncertain nature of much of its income, it would be prudent for the charity to hold a level of free financial reserves (total unrestricted funds less those held as fixed assets) for the following purposes:

- To provide adequate short-term liquidity, and cover temporary timing differences in grant claims;
- To provide reliable funding over the longer term;
- To enable the Trust to respond quickly to unexpected opportunities, such as the purchase of land for nature reserves (the first of its charitable objects);
- To absorb setbacks and manage change should a major income stream fail.

Trustees have determined that the level of free reserves held by the charity should not normally fall below six month's total unrestricted costs.

The Finance & Property Panel monitor the level of reserves and report regularly to the Trustees. Trustees, advised by the Finance & Property Panel, review the Policy annually.

3.3 Investment policy

The Trustees review the charity's investment policy each year to ensure that the policy remains appropriate to the nature of the different funds available for investing. The charity seeks to produce the best financial return within an acceptable level of risk.

Funds have been divided into those expected to be held for a long term horizon and those that may be needed in the short term. The investment objective for the unrestricted long term reserves and the endowment funds is to generate a return in excess of inflation over the long term to maintain capital whilst generating an income to support the on-going activities of the charity. The investment objective for the unrestricted short term reserves and restricted reserves is to preserve the capital value with a minimum level of risk. Unrestricted assets should be readily available to meet unanticipated cash flow requirements.

The charity has divided the funds available for investment between two independent professional investment managers. The two managers have differing approaches to investment which complement one another and therefore reduce the overall risk. The charity's cash balances should be deposited with institutions with a minimum rating of A- or invested in a diversified money market fund including Common Deposit Funds.

The Finance & Property Panel has delegated responsibility from Council for agreeing strategy and monitoring the investment assets. The Finance and Property Panel receives reports for review from the investment managers and reports formally to Council on a quarterly basis.

The Trustees have established an ethical investment policy which excludes companies based on the level of environmental impact from the activities of those companies and the actions taken by those companies to mitigate negative impacts.

3.4 Risk management

The Trustees have reviewed the risks to which the charity might be exposed and categorised and prioritised perceived risks by potential impact and likelihood of occurrence. Risk can be broadly fitted into the following categories:

- Governance
- Strategic
- Reputational
- External
- Operational (including financial management)
- Conservation

A corporate risk management policy has been established. Systems and procedures to mitigate risks have been identified. All perceived risks are re-assessed on a quarterly basis and priorities are reviewed in light of prevailing circumstances at that time.

3.5 Professional support

To ensure compliance with legislation, the health and safety of staff, to protect the liability of Trustees and staff and to manage DWT in as efficient and effective manner as possible, professional advice is obtained from external specialists. Currently specialists include:

- Financial advice for staff and DWT's Group Personal Pension Plan – Jonathan Havard at The Minster Partnership.
- DWT's Group Personal Pension Plan - Royal London.
- Employment law advice – Lester Aldridge.
- Auditors – Nexia Smith and Williamson.
- VAT – Saffrey Champness
- Health & Safety – Andrea Lakin at Safety & Health 1st

3.6 Health & safety

DWT is committed to meeting its statutory obligations to provide a safe working environment for its staff, trustees and volunteers working in buildings, on nature reserves, at events and other work activities.

DWT is also committed to meeting its duty of care to non-employees, such as visitors to buildings, reserves and events, by providing information on hazards through statutory signs, site information/education; leaflets, websites and safety talks, with information supported by site hazard overview documents and emerging Visitor Safety Risk Assessments.

Overall responsibility for the strategic leadership and management of health, safety and welfare is that of the Chief Executive, with operational delivery being the responsibility of all Directors and

managers; overseen and monitored by the Director of Operations and Development, to meet obligations under the Health and Safety at Work etc Act 1974 and its subsequent regulations.

The DWT Health and Safety Committee receives reports from key staff on topics including:- legislation updates, topics for consultation and communication, accident data, reviews of policy and risk assessments. DWT contracts a qualified 'competent person' for health and safety for the provision of guidance, advice and training.

Additionally, all members of staff have legal duties to take reasonable care for their own health and safety, report any concerns or accidents and follow safe working practices in accordance with relevant legislation and DWT's safe working procedures, for their own safety and that of other staff and volunteers, for whom they may be responsible and to whom DWT may owe a duty of care.

3.7 Human Resources

Human Resources includes staff development and training, employee engagement and general employee relations in terms of back office functions. Procedures for dealing with recruitment, appraisals and performance management are also managed by the HR function. Employment law compliance is ensured with input from specialist advisors. DWT's Equal Opportunities policy provides the framework for ensuring fair treatment and the absence of unfair discrimination in all the organisation's employment-related policies, practices and procedures.

DWT is a member of the Employee Assistance Programme offered by HealthAssured, offering confidential support services to staff and their families. This facility is available 24 hours a day, and includes access to counselling sessions if appropriate as well as staff access to an online health portal.

3.8 Commercial activities

DWT's Commercial Board has responsibility delegated from DWT Council for the success of DTNC (Sales) Limited and other commercial activities of DWT. This Board has delegated responsibility for formulating, reviewing and approving the strategy, financial activities and operating performance of these activities. It also provides a forum for discussion, advice and debate over major issues and provides leadership for relevant staff. Amongst other activities the Commercial Board is responsible for ensuring DWT's policies and values are followed where they relate to commercial activities. Over the 3 year period to 2020, DWT recognises a need to increase commercial income to support our conservation activities.

3.9 Membership recruitment

The Wildlife Trusts in the South West established a regional face-to-face membership recruitment business, South West Wildlife Fundraising Limited (SWWFL), in order to protect and sustain this critical area of Trusts' income. SWWFL's role ensures that recruitment is effectively managed, that it does not become a drain on individual Trusts and that it remains part of a balanced fundraising strategy. SWWFL not only benefits member Trusts, by providing a good investment via loans, it also converts a function that costs most individual Trusts money, into one that generates a surplus for their benefit.

SWWFL has an annual recruitment target of 1,000 memberships for DWT in 2017/18, which is expected to grow to 1200 during the plan period. This will generate circa £78,000 of additional income each year. Its work is complemented by other membership recruitment and support work, through staff, through other agencies and through our website and social media so that DWT retains a good mix of membership recruitment methods.

3.10 Supporter development

In 2015, the Wildlife Trusts in the south west collectively produced a Supporter Development Strategy 2015-20 to enable greater marketing collaboration and to encourage increased sharing of skills and resources to grow our supporter base. This strategy provides a focus for our ongoing regional supporter development work and recognises that our local focus is a unique strength and one that taps into key audience drivers of community and place. But as single Trusts, we do not have the skills, the systems, the capacity or the funding to effect transformation at the level required to engage new supporters at scale and effectively manage them for longer term benefit. However, through shared investment, pooling of resources and sharing of skills, knowledge and expertise, Trusts can achieve the collective impact needed without losing individual sovereignty or local identity.

DWT trustees have agreed funding for this regional Supporter Development initiative to find new and innovative ways to engage and retain supporters. These ways will require research, development, testing and implementation. It is hoped that this will significantly increase our membership, or at least supporters, through a step change not just incremental growth, in 5 years. Success will depend in part on our ability to convert a much greater proportion of our public engagement into new supporters.

4. Conservation elements

DWT's operations are designed to ensure that 'big initiatives' for conservation can be created, initiated and function seamlessly across departments as efficiently and effectively as possible. Such initiatives will provide opportunities to join many of our objectives together and maximise the benefits of achieving them. They are likely to require innovation, concept building, working with external partners from within and outside the conservation sector, establishment of community support and major fundraising efforts. The concepts of Living Landscapes and Living Seas provide the vision to do this, and DWT's contribution to the long-term aims of nature needing to be 'bigger, better, more and joined'².

4.1 Living Landscapes

The Wildlife Trusts are leading on the delivery of Living Landscapes as our response to the need to look to wildlife conservation at a landscape scale beyond the boundaries of designated sites. The main aim of Living Landscapes is to secure a better future for wildlife, but crucially the Wildlife Trusts' approach recognises the wider social, economic and environmental factors and benefits that influence wildlife, and seeks to find mutually beneficial solutions with the people whose communities and livelihoods lie in these landscapes.

A Living Landscape involves the recreation of robust, resilient and connected landscapes on a large scale. Living Landscapes are:

- Highly valued and accessible to people.
- Full of wildlife.
- Rich in opportunities for learning, health and wellbeing.
- Helping local communities and businesses to thrive.

They will safeguard our wildlife through an unprecedented period of climate change, and be stronger in the face of changes to agriculture, industry and communities. The approach means we take into account the many factors which impact on wildlife and the wider benefits that nature conservation can bring to society as well as for wildlife itself.

4.2 Living Seas

DWT wants to see and contribute to a return to a healthy marine environment which is rich in species and a wide range of habitats, and which provides sustainable livelihoods for those that rely on the resources or services that could then be provided. Living Seas are The Wildlife Trusts' vision for the future of the UK's seas. Within Living Seas, marine wildlife thrives, from the depths of the ocean to the coastal shallows. In Living Seas:

- Wildlife and habitats are recovering from past decline as our use of the seas' resources becomes environmentally sustainable.
- The natural environment is adapting well to a changing climate, and ocean processes are helping to slow down climate change.

² As set out in Making Space for Nature (2010), A review of England's Wildlife Sites and Ecological Network chaired by Professor Sir John Lawton.

- People are inspired by marine wildlife and value the sea for the many ways in which it supports our quality of life.

We will achieve this vision by focusing our work on three priorities:

1. Marine Protected Areas / marine wildlife.
2. Marine planning / sustainable development.
3. Sustainable fishing and seafood.

4.3 Delivery of Living Landscapes and Living Seas

In order to achieve Living Landscapes and Seas, it is necessary to break down components of the task a little. This allows specialist staff and volunteers and their work programmes and projects to focus their efforts on discrete elements of the whole, and our senior staff, trustees and Panel members to ensure that the overall aims and priorities are being met. We establish projects on a habitat, species or geographic basis, as and when we are able to establish local partnerships and/or as funding is available. There are however some key concepts on which DWT has traditionally specialised and built its reputation, and which are likely to form our ongoing work for many years. These include:

- **Nature Reserves.** DWT currently has 43 nature reserves, some of these established back from the founding days of the Trust. These reserves between them protect some of the most threatened habitats and species in Dorset. They are also places where we aim to demonstrate habitat management and provide a wildlife experience for visitors.
- **Visitor Centres.** DWT currently has five visitor centres (plus two other offices which can host some events), developed over a number of years. Some are long-standing, others more recent. Together they present DWT as a substantial entity across the county and offer one of DWT's main 'shop windows' for members, the public and to demonstrate our standing to partner organisations and funders. We aim to move towards a position where centres are much more clearly seen as 'hubs' for Living Landscapes and Seas work, as well as continuing to develop appropriate commercial activities and fundraising to support DWT's work. We also want to ensure all of our centres reach their potential to engage more people from more of the Dorset community. In particular in this 3 year period, we look to develop and enhance the visitor facilities at Brownsea Island, in partnership with the National Trust, and to investigate opportunities for a high footfall wildlife activities centre in the county.
- **Engaging with land and sea managers.** We cannot own or control most of the land which is crucial for wildlife, nor would we wish to as this would not only be costly in the long term but also prevent other owners from bringing their skills and expertise into the field of conservation. So by advising and assisting others, and learning about how they manage their businesses, we can help formulate management practices which are both beneficial for nature and fit in with the aspirations of those who own, manage or work the land and sea. In particular DWT has over the years built up a strong knowledge and reputation for expertise on grassland habitats, ancient and 'veteran' trees, wetlands (rivers, ponds and wet grassland), and marine habitats.

- **Sites of Nature Conservation Interest.** SNCIs, as explained in section 1.8, are selected as habitats vital for the conservation of wildlife across most non-marine habitats in Dorset. DWT has led the process for establishing, recognising and monitoring SNCIs since the early 1990s. The majority of SNCIs are privately owned, and the process relies on the goodwill of landowners to allow access for surveys and to undertake management. DWT aims to provide help and advice to owners through our Living Landscape schemes and other targeted projects. The SNCI system provides a structure to help us monitor how wildlife is doing in Dorset, and enables Local Authorities and developers to take priority habitats into account when making decisions on planning applications.
- **Community advocacy.** Through our work in both urban areas (south-east Dorset and Weymouth and Portland) and rural, DWT has developed strong experience in working with communities. This is not just about involving people in our activities and sites and increasing the numbers of members, though this is important. It is about enabling individuals, businesses and communities to take best practice action for wildlife. This, if successful, will result in a 'snowball effect' so that many activities that benefit wildlife begin within the community itself without DWT having to take a lead role.
- **Providing opportunities for volunteering.** DWT was built through volunteer effort. Our success today still relies on a large and dedicated pool of volunteers to both directly assist us and also to be inspired by the information and training we give them to take action in their communities. We aim to provide a varied range of volunteer opportunities across the county and suitable for everyone from beginners to experts and of all ages and abilities. To do this we need to maintain a strong understanding of what we can do to help and encourage people to volunteer, and to overcome such barriers there are to taking part.

4.4 DWT conservation structure

Within our conservation work, we plan to deliver this strategy through our:

- Strong reputation for professionalism and evidence-based conservation, ability to speak authoritatively on policy and wildlife and hold others to account on behalf of nature in Dorset.
- Centres of excellence (reserves and centres) where people can come and experience, learn and enjoy nature.
- Community advocacy which increases our reach through communities.
- Strong reputation for delivery and partnership working ethos, by which we are trusted and chosen by partners to lead and deliver projects on their behalf.
- Development of a more fleet-of-foot and entrepreneurial culture, with appropriate commercial opportunities and having the flexibility to take on new initiatives that deliver our core aims.

Delivery will be through our three conservation teams, Reserves, Living Landscapes and Seas and Policy, Advocacy and Evidence, with the Policy, Advocacy and Evidence team providing the steer through 'matrix management' for the delivery of our conservation work, as follows:

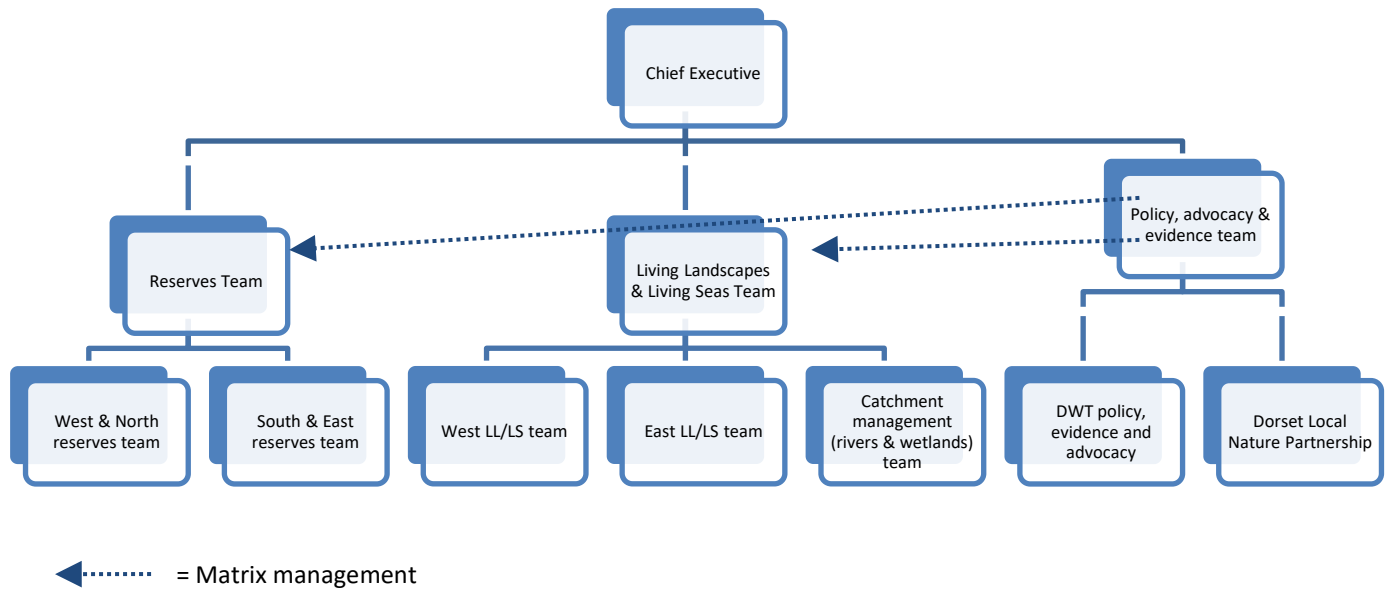


Fig. 4: DWT Conservation Team structure from April 2017.

5. Communications and PR elements

To achieve influence, remain relevant and to secure sufficient support, we need to raise our profile through our communications programmes. As was outlined in section 1, profile is associated with recognition, brand, results and relevance. We have to engage in the issues that are important for Dorset that relate to wildlife and where we have expertise.

Our communications programmes aim to strengthen DWT's image as a high achieving and professional organisation; to nurture and inform members and volunteers; and to attract new supporters and new sources of income. At the same time we need to differentiate DWT from other conservation charities active in Dorset.

5.1 Target Audiences

- Potential new members in Dorset.
- Current members and volunteers.
- Supporters and potential supporters who are not members.
- Local opinion leaders, businesses and communities.
- Local government.
- Partner organisations.
- Dorset landowners and farmers.

5.2 Target Media

- Press
 - The Daily Echo, the Dorset Echo, Blackmore Vale, Gillingham Matters, Sherborne Matters, Western Daily Press and Western Gazette – local and regional newspapers
 - Dorset magazine, Dorset Life, Sherborne Times and Just About Dorset magazines.
 - Free district magazines such as Parkstone Matters, Wimborne Matters, Ferndown Matters etc.
- Radio
 - BBC Radio Solent & Dorset
 - Wessex FM, Hope FM, Abbey 104 & Breeze FM.
- TV
 - BBC South Today news and Spotlight programmes.
 - Meridian, ITV Westcountry
- Digital media
 - DWT website
 - Other websites
 - Email
 - Social media - Facebook, Twitter, YouTube and flickr
 - Online magazines such as Land Love
- Other media
 - Talks
 - Agricultural shows
 - Community events

We have identified (Section 1.7) that to increase support for wildlife and DWT, there needs to be an increased emphasis on effective and varied communication methods within this plan period. We

will develop our communications further as we go through the plan. It is therefore helpful to note the range of options available to us at this time:

Communication tools	Main audiences			
	Members	Public	Partners	Decision-makers
Dorset Wildlife Magazine	✓		✓	✓
e-newsletters	✓	✓		
Topic-based news				
Highlights and upcoming events	✓	✓		
Best practice case studies			✓	✓
Evidence, figures & results of DWT projects			✓	✓
Website	✓	✓	✓	✓
Webcams/video	✓	✓		
Social media	✓	✓		
Events	✓	✓	✓	
Guided walks	✓	✓		✓
Training courses	✓	✓	✓	
Talks	✓	✓		
Press/media (TV, radio, written press)	✓	✓	✓	✓
On site interpretation	✓	✓		
Visibility of DWT logo	✓	✓	✓	✓
Through partnership projects			✓	✓
Face-to-face			✓	✓
Conferences			✓	✓

In order to successfully communicate the messages that DWT aims to disseminate we must:

- Provide a credible voice for wildlife with our messages based on good quality, accurate, reliable information to underpin our professional reputation.
- Make time to share and celebrate our successes and the stories which our work has created.
- Demonstrate why the topic we are speaking about is relevant and chimes with what is important to people locally.
- Make sure our messages are inspirational – good news should be passed on whenever possible and where news is less positive for wildlife, we should also inform people what they can do to help.
- Ensure the integration of our communications across traditional offline and digital online media. Our online communications should complement and work with our offline ones.
- Be prepared to challenge when we do feel something should change.

- Take time to speak one-to-one with people, at events, through mail, phone and electronically and in particular spending time briefing partner organisations and decision-makers about our work.
- Ensure technical language is avoided where it might be confusing, but that technical concepts, explained clearly, are used with confidence when appropriate to maintain credibility.
- Be prepared to engage with the major issues for the county.
- Keep to issues related to the natural environment, keep on message and adhere to our policies.
- Be trained and proficient in dealing with the media and interviews.