

## YORKSHIRE DALES NATIONAL PARK AUTHORITY

30<sup>th</sup> May 2006THE YORKSHIRE DALES MILLENNIUM TRUSTPurpose of report

To consider the recommendations contained within the report of the Head of Park Management and the Director of the Yorkshire Dales Millennium Trust (YDMT) on the future relationship between the two organisations.

Strategic Planning Framework

The information and recommendation(s) contained in this report are consistent with the Authority's statutory purposes and its approved strategic planning framework:

- **Best Value Performance Plan**  
Setting the scene – partnerships, page 14

Background

In 2005 the Authority was the subject of the National Park Performance Assessment (NPAPA) process. The peer review team who undertook part of the assessment considered the Authority's relationship with the YDMT.

The 'Partnerships section' of the final report stated the following:

- 5.1 *The establishment of the Yorkshire Dales millennium trust has been a creative and successful way of accessing external funding. This partnership which was set up by the authority in 1997 has since drawn in £14m in funding. Whilst being a sound partnership approach in its own right, it has further stimulated partnership working through its projects and activities.*

*Issues to consider:*

- 5.2 *There is limited monitoring of work with the Yorkshire Dales millennium trust. The Authority provides substantial financial support to the trust but has no service level agreement, monitoring or outcome measurement in place. More could be done to show that the trust is continuing to contribute to Authority priorities and objectives.*

Subsequently the NPAPA Improvement Plan, agreed by the Authority at its meeting on 28<sup>th</sup> March 2006 recommended that we should:

*Recommendation 4 (b) :*

- *Develop measures to show the extent to which YDMT is contributing to Authority priorities.*

*Actions:*

- *Assess YDMT's current contribution to achieving the Authority's aims and objectives*
- *Agree appropriate arrangements with YDMT for measuring and reporting performance in relation to Authority funded work.*

The **Annex** to this report entitled, 'The Relationship between the Yorkshire Dales National Park Authority and the Yorkshire Dales Millennium Trust' is a joint report produced by the Head of Park Management and the Director of the YDMT. It seeks to address the recommendations of the NPAPA. It provides information on the historical background of the YDMT, its management and charitable status, its achievements to date and the advantages and issues for the National Park Authority of working with the Trust. The report contains a number of recommendations for formalising and strengthening the future partnership, the key recommendation being the development of a 'Memorandum of Understanding' between the two organisations.

The annex report was considered by YDMT trustees at their meeting on 4<sup>th</sup> May. The trustees broadly welcomed the report, recognising the need to formalise the arrangements between the two organisations and accepting the recommendations subject to some comments. These comments have been added to the report in the appropriate place in parenthesis.

## **Conclusions**

Since its inception in 1996 the YDMT has grown and matured into an effective and completely separate organisation from the National Park Authority. It is timely therefore that the Authority and the YDMT should put their partnership on a more formal and clearly defined footing. The recommendations within the annexed report aim to start that process so that it can be continued through the development of a 'Memorandum of Understanding'.

## **RECOMMENDATION**

That, subject to member comment, the recommendations within the **annex** be agreed and taken forward.

JON AVISON  
HEAD OF PARK MANAGEMENT

Background documents: none

5<sup>th</sup> May 2006

## **THE RELATIONSHIP BETWEEN THE NATIONAL PARK AUTHORITY AND THE YORKSHIRE DALES MILLENNIUM TRUST**

This paper is intended to summarise the relationship between Yorkshire Dales National Park Authority (YDNPA) and Yorkshire Dales Millennium Trust (YDMT), and to propose how the relationship might be developed in future.

### **Background / History**

Yorkshire Dales Millennium Trust was set up in 1996, largely at the instigation of YDNPA staff and members who were keen to provide a vehicle for bringing funds into the area; funds not directly available to the Authority.

YDNPA funded the majority of the initial set-up costs of YDMT, which was then launched as a separate entity and registered as a Charity and Ltd Company. YDMT began employing staff and operating in April 1997. Initially two members of YDNPA staff were seconded to the Trust. Since then YDNPA has continued to provide direct financial support, and also has contractual and other less formal (but close) links with YDMT which are outlined below.

YDNPA's recent external Performance Assessment Report described the relationship with YDMT as "a sound partnership approach in its own right" and "a creative and successful way of accessing external funding". It also recommended that measures be developed to demonstrate that YDMT contributes to Authority priorities and that the partnership between the two organisations be formalised.

### **Structure of YDMT**

The Trust is a completely separate entity to the National Park Authority.

It is a Registered Charity and a Company Limited by guarantee. Like many charities, it also has a subsidiary company, YDMT Consultants, to allow trading activities outside the Trust's stated charitable purposes - such as merchandising of Christmas cards and the like.

The Trust has full Memorandum and Articles and uses the shorthand:

***"YDMT works to support the environmental, social and economic well-being of this special area"***

The Charity is run by a board of trustees – currently 14 in number. These are individuals with a wide range of knowledge and interests, united by a love of the Dales. Current trustees who are also YDNPA members are Carl Lis, Jerry Pearlman and Steve Macare. Previous trustees have included Robert Heseltine, Alice Amsden and Heather Hancock. It must be emphasised that

these people were all invited on to the board as individuals – YDMT has no “ex officio” trustees. The Trust is limited by its Articles to having a maximum of 15% trustee representation by people “connected with” local authorities.

The relationship between YDMT and YDNPA falls under Charity Law and the Local Authorities (Companies) Order 1995. This is summarised by Operational Guidance Note 56 on the Charity Commission’s website [www.charity-commission.gov.uk](http://www.charity-commission.gov.uk) The basic principle is that *“In order to be a charity a body must be established for exclusively charitable purposes. It cannot be established wholly or in part to further the purposes of a non-charitable body such as the authority itself”*

*\* ( YDMT Trustees comment: critical that the YDMT clearly demonstrates that it is a separate organisation to the YDNPA and the differences, in legal terms, should be clarified)*

### **Achievements of YDMT to date**

Helping to conserve the physical heritage features which make up the Dales landscape has been the core of the Trust’s work to date. Over the last 8 years more than 600 individual projects worth £14 million have been assisted. These have included woodlands, wildlife habitats, barns, walls, village halls, historic buildings and features of all shapes and sizes.

Two successful major programmes dominated the first seven years of YDMT’s existence. The “Environet” and “Dales Living Landscape” schemes were funded by the Millennium Commission and Heritage Lottery Fund and brought in £5.5million of lottery funds to the Dales. Many individual grants were given directly to YDNPA for projects.

The Trust’s role has widened over the years – catalysed by Foot and Mouth. It was firstly asked to distribute £220k by Yorkshire Forward as part of the Rural Economic Recovery Programme. Part of this money was distributed outside the National Park, and for a variety of environmental, social and economic projects. The Trust is now helping with issues as diverse as countryside apprenticeships, supporting local contractors, encouraging sustainable development, social exclusion, education and skills training, and trying to engage communities in nearby conurbations with the National Park.

The way the Trust operates has also diversified. Although finding funds for others to deliver a project (YDNPA, landowners etc) is still the preferred method, there are some cases where direct project management is the only available way. Good examples are “Learning in limestone Country” or the new “Hay Meadows” project where only a Registered Charity such as the Trust was allowed to access the available funds and run the partnership scheme. Other programmes are being run by the Trust on a contract basis – including management of the Authority’s Sustainable Development Fund.

Not restricted geographically, it has also begun to work across other parts of North Yorkshire; for example managing North Yorkshire CC’s Aggregates Grants Scheme and Nidderdale AONB’s SDF programme. .

## **Advantages for the National Park Authority of working with the Trust**

Whilst YDMT is recognised as an innovative creation in a National Park and held up as a model of good practice it is important that any assessment of its value to the Authority is based on fact. The premise that it is a 'good thing' which should be supported by the Authority needs to be demonstrated.

### **Direct Funding**

The principal reason for setting up an external funding vehicle still remains, and becomes more important as pressure on finances increases. The Trust is able to apply for grants and sources of funding not legally available to a Local Authority. In addition, many sources are more likely to fund a Charity than a public body – for example Charitable Trusts, Corporate and individual donors.

The Trust currently employs three professional fundraisers, supported by management, administration and project staff all now with considerable experience of fundraising.

### **Match-funding**

Most of the Trust's project work is hands-on, assisting landowners and others to organise their schemes. This usually includes applying for match-funding for individual projects as well as the money directly from the Trust.

### **Donors**

One of the principles behind setting up the Trust was to allow the many people who love the Dales to contribute to the well-being of the area, wherever they come from. To date more than 30,000 people have donated, mostly through the "Plant-a-tree" scheme". These donors are remarkably loyal lovers of the Dales and many give regularly. A long-term legacy campaign aims to build on this generosity. A new push for corporate and major donors hopes to achieve similar long-term commitments.

### **Assistance**

With 14 staff at present the Trust provides extra "pairs of hands" to help deliver the Authority's work and spread the message.. An obvious example is dealing with landowners and community groups to assist with their capital schemes. Trust staff provide a supportive presence on many bodies such as the Dales Woodland, Biodiversity and Archaeology fora, Craven Regeneration Group etc and through contact with donors, visitors and businesses.

## **Differing Roles and Culture**

YDMT remains "non-political" and is not a lobbying or campaigning organisation, thus avoiding any possible conflicts of interest as a partner.

The Trust is able to undertake work outside the Authority's remit but in a way which complements it. For example through direct support for economic development, or projects which extend beyond the Park boundaries.

As a small business with no guaranteed income and no reserves, the Trust has to be entrepreneurial in its activities. To put it simply, if Trust staff do not continually find sources of funding, and deliver projects and contracts on time

and to budget, they will be out of a job. In addition, as a charity the Trust has to be seen continually to be making a real difference in the Dales – by donors, funders, trustees and the Charity Commission.

### **Current Trust activity (2006/07)**

- **Donate to the Dales**

The public purchase pin-badges and register as donors through 150 sales points in National Park Centres and local businesses. Larger donors can also contribute directly to individual projects. The aim is to raise at least £1million over three years.

YDNPA Involvement Full partner: Close work on promotion and marketing (External Affairs); finding and managing suitable projects (Conservation and Park Management).

- **Learning in Limestone Country.** Jan 2005 – present. A £660k, three year education and community involvement project funded by HLF, English Nature and Field Studies Council.

YDNPA Involvement Member of steering group; Officer time input; co-ordination and joint work with “Outreach” team (External Affairs).

- **Pennine Dales Meadows** (“Hay Time”) March 2006 – present. A new £520k, four year project to restore 420ha of meadows within the National Park and North Pennines AONB. External funding recently obtained by YDMT from Tubney Trust, DEFRA, English Nature.

YDNPA Involvement Full Partner. Steering group member, financial input, officer support.

- **Dales Woodland Restoration** 2006-8. Recent grant of £270k obtained by YDMT from English Nature to help deliver Dales Woodland Strategy by planting 150Ha broadleaves (total cost £670k).

YDNPA Involvement Full Partner; officer time. Details being discussed;

- **Countryside Apprenticeship Scheme 2004- Present. Training in land-based skills and placement with organisations and private estates**

YDNPA Involvement **Partner; Placements (Park Management)**

**Sustainable Development Fund (SDF)** 2002- Present. Delivery of DEFRA grants on behalf of National Park Authority. Currently standing at total 65 projects, £640k grants, £2.8million projects.

YDNPA Involvement NPA Fund managed under contract by YDMT

- **North Yorkshire Aggregates Grants Scheme** Nov 2005-present. A £410k pa scheme to “benefit communities adversely affected by quarrying”. This year £118k given to 7 projects within the Park.

YDNPA Involvement NYCC and NPA Fund managed under contract.

- **Community Wardens Scheme.** Pilot scheme (2 Parishes). A modern version of the “lengthsman” scheme to help parishes with practical maintenance – and potentially social inclusion and crime prevention.

YDNPA Involvement Partner; financial input (to support PROW work).

- **Rural Trades Network 2002-Present.** Web-based project to support contractors through marketing, networking and skills-training. Funded by Learning Skills Council; Craven and Askham Bryan Colleges.

YDNPA Involvement Supportive, but outside NPA remit.

- **Other Current YDMT Contract Work** includes:

- a. Management of Nidderdale AONB Sustainable Development Fund
- b. Development of environmental conservation HND for Craven College
- c. Research for Rural Solutions on possible development of Langcliffe Quarry

### **Total value of projects 2005/06**

The turnover of the Trust in 2005/06 totalled £1.2 million, providing approximately £2m of activity when matched funding is added. £700k of this was “restricted” funds given to others to undertake projects (e.g. SDF, Aggregates Levy), and of this, £368k was being spent within the National Park to projects worth (with match-funding) over £1m.

£500k was being spent on projects directly managed or delivered by the Trust and virtually all of this was within the National Park (e.g. Learning in Limestone, Rural Trades, Community warden Scheme).

**2006/07** turnover is forecast to be at least £1.7 million (a 40% increase) with a commensurate increase in projects funded.

### **Recent Bids for other potential projects 2006/07** include:

- Countryside apprenticeships scheme; Extension of current scheme (£200k) *European Social Fund, DET; Charitable Trusts*
- Dales For All Project to implement NPA Integrated access Strategy Lottery (£970k towards £1.6million scheme)

## **Recommendations for the Future Partnership**

### **The Wider Relationship**

The YDMT has matured as an organisation, come through fairly radical changes with the demise of large scale funding projects and as a result is a different organisation than it was 10 years ago. Its relationship with its “parent” Authority has therefore understandably changed. There are not the same close staff links that there were resulting from the original secondment of NPA staff to the trust. Communication between the two organisations is not as natural or spontaneous as in the past. However the aims of the Trust as set out in their Strategic Plan relate closely to the NPAs statutory purposes. There are basically three directions that the relationship between the two organisations could go.

1. It could be accepted that the Trust has now matured into a completely separate organisation and that there is no longer any reason for the NPA to be closely involved in it. The NPA could gradually withdraw its core funding, develop it’s own funding procurement strategies and use the Trust as and when necessary for project management and delivery. It would lose the expertise, flexibility and added value that the Trust currently brings to its activities and the development of other funding sources would have resource implications. From the point of view of the Trust this may provide a freedom and added zest to adapt that may not be necessary now however it would be a difficult scenario for it to survive. Without the support and the input into project placement of the NPA it may well play an increasingly marginal role. There is little to recommend this option as both organisations would lose out.
2. The two organisations could continue as at present with the NPA providing continuing to provide core funding but there being variable communication and some lack of understanding of priorities and roles. It works and as has been demonstrated much excellent work is achieved but it could be much better.
3. A revitalised and clearer partnership could be developed building on the original reasons for the establishment of the Trust, and on our shared aims. The NPA performance assessment process recognised the value of the Trust to the NPA and the Trust recognises the key role that the NPA plays in its survival and in enabling it to fulfil its aims.

### **Recommendation:**

It is recommended that:

- The core relationship between the two organisations should be re-invigorated by:
  - Agreeing a Memorandum of Understanding that clearly sets out how the organisations will interact, their respective responsibilities to each other and monitoring, reporting and reviewing arrangements.

## Financial

### Funding assistance to NPA from YDMT

There are various ways in which the Trust endeavours to support the NPA's finances:

1. Direct fundraising for NPA projects
2. Direct fundraising for third party projects for them to further NP Purposes
3. Management under contract of programmes which further NP Purposes – and raising of match-funding.
4. Direct delivery of projects by the Trust itself. This is usually where only a Charity can apply for the funding
5. Advice and support to the NPA in securing external funding for NPA managed projects

During the early years of the Trust two big lottery programmes “Environet” and “Dales Living landscape” dominated. This meant that support methods 1 and 2 described above were almost exclusively used, and it was clear that several £million were being brought in to directly support the NPA's work.

In more recent times the Trust's activities have diversified. There are not the large amounts of lottery cash coming in, and their type of work has broadened to include all 4 methods outlined above. There are still excellent joint Trust/NPA projects, but the Trust also runs contracts and projects with many other partners – as does the NPA of course..

It seems fair to say that method 5 “advice and support” also takes place, but on a rather *ad hoc* basis between certain officers in both organisations.

From the point of view of the NPA this situation has two general effects. On the one hand there are staff in the Authority who have become used to the Trust being there to deliver external funding through the Environet and Dales Living Landscape projects and as the funding is now not available on the same scale are shrugging their shoulders and making do with NPA budget allocation. On the other hand there are staff who are successfully pursuing funding streams on their own, and in some cases have found this an easier route to take.

At the same time other National Park Authorities are being successful in setting up large scale externally funded projects such as Moors for the Future and have staff dedicated to sourcing external funding.

The Trust has tried to keep in touch with these developments – for example “Donate to the Dales” has partly been modelled on the Lake District's “Fix the Fells” scheme. Interestingly, other National Parks are now contacting the Trust for advice on setting up their own Trusts – including the Peak District's Moors for the Future team, Northumberland, Snowdonia and Cairngorms. Having seen the success in the Dales, neighbouring AONB authorities are now working with the Trust, including Nidderdale, North Pennines and more peripherally Forest of Bowland. The Community Forests (which recently lost

their central funding) have launched “Plant-a-tree” public appeals almost identical to the Trust’s.

As has been demonstrated in the past the presence of the YDMT has the potential to vastly increase the amount of external funding brought into the area and full use of this should be made by the NPA.

**Recommendation:**

It is recommended that:

- The Trust should be actively encouraged and asked to coordinate funding bids for NPA projects.
- An external funding working group, with clearly set out roles and responsibilities for all participants, should be established and the Trust invited to join and possibly lead the group. This would provide opportunities for both sharing expertise and improving understanding

Financial support of YDMT by NPA

The NPA continues to make an annual contribution to the Trust (currently £45k). As has been described above the Trust last year had an annual turnover of 1.2m and delivered approximately £2m of activities and for the purposes of this analysis it can be taken that the bulk of these further National Park purposes.

This £45k investment by the NPA therefore represents a very small amount, 3.75%, of the Trust turnover. It is however of vital importance to the Trust as a contribution to their running costs and on the face of it, notwithstanding how the activities contribute to NPA priorities, represents good value for money for the NPA in terms of the £2m of activities that the Trust generates

As a charity and small business, the Trust has no guaranteed income. Each year it must raise the funds to support its own establishment and “core” staff - as well as fundraising to support projects. These costs are now kept to a minimum and strictly controlled by management and trustees.

Initially much of this was provided by management fees for running the big lottery programmes. As statutory or lottery funding has become more difficult the Trust has diversified its income streams (as well as cutting costs).

The Trust’s new fundraising strategy sees a mix of methods to maximise the generosity of their own donors; whether individuals (20, 000+), Businesses or Trusts. Examples are a new legacy campaign and a push for new corporate members through Donate to the Dales. Other income streams which have increased include: Merchandising; “Fees” from running programmes and projects under contract; and Consultancy work.

The Trust’s finances are in a more stable state than at any time, but it continues to be a “hand to mouth” operation, with an annual deficit of £33k last year and a challenging “break-even” budget set this year. The Trust holds no reserves or assets. The strategic aim is to improve the income streams

and within three years to build up a reserve of between 3 and 6 months operating costs (in line with Charity Commission guidance).

The Authority's contribution (£45k in 2005/06) is a vital "unrestricted" donation which allows the Trust to lever in funding from many other sources. This contribution provides good value for money by the NPA and it is not seen as practicable for the Trust to replace this funding in the medium term although this could be a longer term strategic aim.

### **Recommendation**

It is recommended that:

- The NPA continues to provide annual core funding to the Trust.
- The arrangement is assessed annually and that the Trust actively attempts to replace this with alternative sources of funding in the long term.
- The performance of the Trust in contributing to NPA priorities and Best Value Performance Action Plan is monitored annually.

*\*( YDMT trustees felt that the use of the word 'monitored' should be changed to 'reported')*

### **Forward Planning**

The NPA has developed reasonably sophisticated forward planning mechanisms through its priority setting and planning documents. The Trust has also recently been through a positive strategic planning process and produced a 'Strategic Plan 2005-08' (**Appendix**). The two sets of forward plans are felt to be complementary – for example the Trust's four Aims and five Objectives are all designed to help deliver the Authority's own objectives.

### **Recommendation**

It is recommended that:

- Future reviews of the Trust's Strategy should continue to take account of the NPA's Park's own planning processes, Purposes, Aims and Objectives.
- The NPA be invited to comment on future reviews of the Trust's strategy

### **Fundraising priorities and delivery**

What is now needed are closer and more detailed discussions about annual plans; this requires the NPA, from its prioritised list of programmes to discuss with the Trust which are priorities for external funding and it requires the Trust to adopt these named projects as fundraising priorities.

Traditionally project managers from the Trust and NPA staff have worked closely together to deliver projects on the ground, direct ownership being determined by the nature and derivation of the project. Both organisations have recognised and developed skills in this area and it works well.

**Recommendation:**

It is recommended that:

- The Trust and the NPA develop a close and detailed joint annual planning process to identify and adopt fundraising priorities.
- \* *(YDMT trustees felt that as the trust was an independent body, and with reference to its charitable status, care should be taken over how detailed a 'close and detailed' process might be).*
- The Trust and NPA continue to work closely to deliver projects on the ground, using the staff and skills as appropriate to each case.

**Project and Contract Management**

The Trust delivers the SDF scheme on behalf of the NPA (and the Aggregates levy on behalf of NYCC) . A separate report analyses the success of the first arrangement although both are basically seen as successful. Although the arrangement is basically seen as very successful, there is a need to develop more formal and clearer communications. In addition there is a need for the NPA to be adequately recognised as the provider of the SDF, at the moment the fund appears to be seen as a Trust fund rather than a NPA one. It is important that, as the Trust are paid as 'contractors', to deliver the scheme, the amount of NPA staff time spent supporting the trust in this is commensurate with the fee that the Trust charges for the administration.

The Trust should expect that these (and any new contracts) continue to be reviewed as with any other contract; on the basis of value for money, and any added value of employing the Trust. Contracts such as these are subject to the NPA's financial regulations and it may be appropriate, in the light of a resolve to more formally define the relationship, to review the effectiveness of these in service delivery.

**Recommendation:**

It is recommended that:

- All contracts made with the Trust are decided and reviewed on the basis of value for money and added value.
- An review is undertaken of the appropriateness of the current NPA financial regulations for dealing with the trust.
- Roles and responsibilities are clearly defined and agreed between the Trust and the NPA.
- The amount of NPA staff time spent on the scheme is monitored and capped at a sensible level.

**Direct Delivery of projects**

The Trust directly delivers some projects. This is usually where the NPA or another body would not be eligible to apply for funding and run the project. A good example is "Learning in Limestone"; funded by HLF and English Nature. The Trust employs 3 staff to deliver this project, which directly supports Park Purposes. The NPA is a member of the steering group and provides officer input (there is an agreed memorandum of operation).

**Recommendation:**

It is recommended that:

- The NPA continues to provide support as appropriate to these projects, and as agreed in each case.

**Other and New Opportunities**

With increasing pressures on the National Park and on the NPA's funding, both organisations need to be light on their feet in looking for ways of working and chasing funding opportunities together.

**Recommendation:**

It is recommended that:

- Any formalising of the partnership between the two organisations must not limit the current flexibility and opportunities for creative thought.

**Communications**

As is the case in every review the need for better communications between the two organisations has been identified. There is an underlying issue of 'ownership of the trust' within the staff of the NPA and vice versa. The original closeness of the two organisations has inevitably been lost and, if that closeness is a good thing, it is necessary to work harder to achieve it. It is suggested that it is a good thing and that there are a number of mechanisms, in addition to the recommendations above that touch on liaison and communication, which will help achieve it.

**Recommendation:**

It is recommended that:

- As recognised through the NPAPA, the two organisations should produce and sign up to a formal 'memorandum of understanding' that clearly states the roles and relationships between them.
- The Trust should consider producing a funding 'newsletter' to alert NPA staff to funding opportunities and new initiatives.
- The regular meetings between the Trust Director and Senior Managers of the Authority should continue but should be more formally structured to monitor and assess current issues and trends and feedback be provided through both organisations.
- Means of ensuring that the NPA gets appropriate recognition for its part in funding delivery should be developed.
- Staff of both organisations should be invited to take part in appropriate staff development, training and social opportunities. e.g. staff development days, staff meetings.

## **Current Relationship, the YDMT Perspective**

The “bottom line” of the relationship continues to be that YDMT trustees would not endorse or support anything which went against National Park Purposes or Aims.

The vast majority of the work that the Trust undertakes is intended to directly deliver the aims and stated priorities of the Authority. Examples would be the heritage project funding through “Donate to the Dales”, contracted management of the Sustainable Development Fund, or direct delivery of “Learning in Limestone Country”.

A certain amount of YDMT work is outside the direct remit of the Authority, but complements it. An example would be the Rural Trades Network, which aims to support local contractors.

The working relationship has always been good, with officers co-operating at all levels. It can be characterised as both “sides” genuinely wanting to get things done on the ground with little or no sense of competition. It is recognised that this culture may not extend to all staff in both organisations, particularly newer staff who either do not have the historical connections or are not involved in joint projects. Staff and trustees are keen to continually find ways of improving communication with the Authority.

The Trust recognises the increasing financial pressures on the NPA, and the need to continually justify the value for money provided in return for the NPA’s financial support.

If anything there is a feeling from the Trust that the Authority has not taken enough credit in the past for much excellent joint work.

*\*(YDMT Trustees felt that publicity for projects should be a two way process with both organisations recognising each others input).*

## **OVERALL RECOMMENDATION:**

It is concluded that the YDNPA and YDMT should draw up a suitable ‘Memorandum of Understanding’ and agree joint working arrangements on the basis of the recommendations within the body of this report.

**Jon Avison**                      **Head of Park Management, YDNPA**  
**David Sharrod**                **Director, YDMT**

**January 2006**

## YORKSHIRE DALES MILLENNIUM TRUST (YDMT) STRATEGIC PLAN 2005-08

### MISSION & VISION *Why are we here?*

Our full primary purpose is written in our Memorandum. *Our preferred "Strapline" is:*

***"Yorkshire Dales Millennium Trust. works to support the environmental, social and economic well-being of this special area"***

### AIMS *What are we trying to achieve?*

1. To conserve or restore the natural, built, scenic and cultural heritage features which together make up the special landscape of the Dales
2. To develop and encourage opportunities for wider access to and understanding of the Dales
3. To improve understanding of and wider use of countryside and traditional skills
4. To support the people and communities of the Dales to live and work in harmony with this special and protected landscape

### OBJECTIVES 2005-08 *What are our targets?*

1. To help complete 150 projects worth £5m which conserve, restore and/or improve access to Dales heritage features
2. To help develop opportunities for 6000 people from targeted communities to access and understand the Dales
3. To help deliver improved understanding and wider use of countryside and traditional skills to 500 people
4. To help complete 60 projects which support the people of the Dales to live and work sustainably in this special landscape

And an "operational" objective:

5. To manage and develop YDMT

**YORKSHIRE DALES MILLENNIUM TRUST (YDMT)  
STRATEGIC PLAN** **2005-08**

**METHODS** *How will we achieve our objectives?*

- Raise and distribute funds to projects
- Manage and distribute others' funds to projects
- Where absolutely necessary, deliver projects directly

**VALUES** *In working towards our aims we:*

- Are passionate about the Yorkshire Dales and enjoy working for them
- Work in partnership with local communities and other organisations
- Work as an enabling body to help deliver other's aspirations for the Dales
- Give help and advice to potential applicants
- Encourage sustainable ways of living and working in this special landscape
- Support work which is complementary to, but not the statutory responsibility of, other bodies
- Comply with the spirit and letter of the expectations of a Charity
- Are sought after as good employers
- Value our donors, supporters and trustees
- Guard the reputations of funders, partners and recipients
- Ensure compliance with funders' guidelines
- Maintain transparent procedures and ensure financial probity
- Communicate consistently and clearly