

1.0 Foreword

2.0 Looking Back 2002 – 2021

Watchtree Nature Reserve was created in 2002 on the 205-acre site of the former Great Orton WW2 Airfield used by Defra in 2001 for the burial of livestock culled during the Foot and Mouth Disease outbreak.

At a public consultation meeting in 2002 the overwhelming view of the Local Community was to create a nature reserve on the site. It was renamed Watchtree, as this was the name of the farm that occupied the site before it was developed as the Airfield in 1942. Defra expect to remain responsible for managing the site for over 50 years to comply with planning and environmental restraints imposed at the time.

Watchtree Nature Reserve Ltd (WNRL) was created in August 2004 by seven people from the Local Community as a Not-for-Profit Company Limited by Guarantee (CLG). WNRL also became a registered Charity in January 2009. The company took on the trial management of the Nature Reserve in April 2005 and from April 1st, 2006, under 25-year lease and land management agreement with a ten-year funding agreement ending 31st March 2016.

Since 2006 WNRL has operated as a social enterprise developing services to support its charitable objects. One major initiative was the creation of a cycle track to access the nature reserve. Watchtree Wheelers was established to make greater use of the trails, providing cycling opportunities for disabled and disadvantaged people. This project later developed into a cycle hire centre for all abilities and is a primary income source for the reserve.

WNRL has developed the habitats and public access facilities, in part, from income earned via the management contract with Defra. Added value to the reserve was achieved by grant funding from a range of sources totalling £638,580 over the last 15 years. (Appendix 1 Grant Income)

On the 31st of March 2016, the Defra funding agreement ended, at that time the organisation employed one member of staff and set about achieving sustainability without external financial backing for day-to-day running costs. Defra continues to support us by providing access to the management center, which we use as a visitors' center.

Up until 2020 we also had access to workshop space and secure storage within Defra's Water Treatment Plant building and compound. This access was revoked in March of 2020, although the access agreement remains on our lease.

Throughout the 10-year Land Management and Funding Agreement (LMFA) with Defra, we accumulated a good 'Reserve' fund. This was achieved by delivering the LMFA objectives utilising our volunteer workforce and claiming the cost of their services at an agreed rate with Defra. This Reserve Fund was sufficient to see us through the transition to being self-funding and has since given us financial security and assured potential funders we are a financially responsible organisation.

Today Watchtree is a popular visitor's attraction ranking at number 8 on the TripAdvisor list of 'things to do' in Carlisle, alongside Carlisle Castle, Carlisle Cathedral and Hadrian's wall. The reserve welcomes over 60,000 visitors per year and employs 13 people across 5 different areas of business.

Sustainability was achieved within the first 12 months of parting company with Defra's financial support and has since been maintained, with the exception of 2020/21 which was an exceptional year due to the covid 19 pandemic. This is achieved through generating income and utilising the efforts of volunteers. Income is generated through donations, membership, café and merchandise sales, cycle services,

agricultural/environmental services, educational services, and events. An active and dedicated team of 40 plus volunteers assist in all areas of the organisation, without whom we would not have achieved such admirable developments.

We continue to raise funds for developments and projects outside of our day-to-day running costs. Our fundraising endeavors include grant applications, crowd funding, personal fundraising, corporate support, and special events.

3.0 Where are we now?

3.1 Watchtree Nature Reserve Ltd now principally provides:

- 205-acre Nature Reserve comprising woodland, meadow, scrub, and wetland habitats for the benefit of local wildlife and visitors (See Appendix 2: Site Map for more detail)
- Parking, visitors centre, café, WC, and access to the reserve for the public and other organisations
- Specialist cycle facilities, equipment and training for the public and group use boasting a range of adapted equipment for disabled riders
- Network of fully accessible trails for the use of walkers, cyclists, runners, wheelchair users etc. Totalling 4 miles.
- Visitor facilities including picnic area, wildlife viewing hides, pond dipping platform and garden.
- Education services including Forest schools for local education providers
- Health and wellbeing services including events and activity program
- Employment of 15 individuals equivalent to 7 full time employees
- Volunteering opportunities for over 40 individuals

3.2 Mission Statement

“Provide a nature reserve which is a haven for a wide range of habitats and species and a community asset for people to enjoy, appreciate and be educated in the values of living with wildlife and nature.”

In short (used as a strapline alongside our logo)

A wildlife haven and community asset for all.

3.3 Charitable Objectives

Our charitable objectives as listed on the Charity Commission registration are:

(I) TO MAINTAIN, IMPROVE OR PROVIDE PUBLIC AMENITIES;

(II) TO PROMOTE FOR THE PUBLIC BENEFIT THE WATCHTREE SITE IN CUMBRIA (THE SITE, AS DEFINED BELOW) AND ITS ENVIRONS, IN PARTICULAR BY ASSOCIATING LOCAL COMMUNITY ORGANISATIONS IN A COMMON EFFORT TO ADVANCE EDUCATION, TO RELIEVE POVERTY, NEED AND HARDSHIP, TO PROVIDE FACILITIES FOR LEISURE TIME OCCUPATION IN THE INTERESTS OF SOCIAL WELFARE, AND TO CONSERVE AND IMPROVE THE ENVIRONMENT.

4.0 Going Forward

4.1 Vision

Watchtree is a uniquely unusual nature reserve. The history of our land, the matrix of our habitats, our commitment to accessibility and the support from; and for, our community is ingrained in all that we have achieved and is something we are incredibly proud of.

Our vision for the future sees us build on our strengths and lead by outstanding example in our various fields:

- Maintain and monitor the diversity of habitats and species to become an acknowledged area of wildlife importance at local and county level.
- Become a flagship outdoor center for accessibility, providing unimpeded access for all, to all our facilities.
- Embed green credentials in all that we do, minimising our impact on the environment.
- Further develop exemplary opportunities for people to learn, play and explore outdoors.
- Promote the use of the reserve and its facilities to improve the physical, mental, and social health of local people.
- Providing employment and volunteering opportunities which develop individuals and support the local economy.

4.2 Values

Our values are our core ethics and principles. They represent the ethos of how we wish to operate and achieve our goals.

- Passionate about creating and protecting natural habitats, wildlife, and the environment
- Dedicated to serving the needs of our communities and be accountable to them for our actions
- Committed to the provision of facilities which encourage all people to enjoy the nature reserve, associated activities, and amenities.
- Nurture and support our staff and volunteers to fulfil their full potential.
- Think strategically for our own, long-term sustainability

4.3 Behaviours

Our behaviors are the regulations within our organisation which ensure we uphold our values.

4.3.1 We will conduct our general operation in a manner which ensures we...

- use every penny raised through donations, services, grants etc. Efficiently in pursuit of our objectives
- accurately and transparently account for our finances.
- recruit and manage our staff and volunteers honestly, supportively, and fairly.
- reduce waste, reuse, or recycle everything that we can and considerately dispose of anything else.

4.3.2 As we progress, we will ensure that any new developments...

- assess potential environmental impact and if necessary, protect important wildlife habitats and species.
- support the local economy through sourcing local products, services, and staff.

- financially contribute to our sustainability and diversity.
- are carbon neutral, carbon negative or will develop to be so.
- provide a service or facilities which enhance the local community.
- Are completely inclusive and accessible to all abilities.

4.4 Priorities 2021 – 2030

Through assessment of our current activities and consultation with trustees, staff, volunteers, and the wider community we have identified the following key areas for development in our immediate future.

(Appendix 2. Director Consultation Results, Appendix 3. Team Leader Consultation Results, Appendix 4 SWOT analysis)

Habitat & Estates – Improvement and/or relocation of our habitat and estates workshop and storage facilities to better serve the team responsible for maintaining access and facilities around the reserve and the habitats within it.

Public Facilities – Increasing and improving public amenities, allowing us to manage increasing footfall. Primarily this includes toilet facilities and car parking.

Watchtree Wheelers – The Wheelers facility is regarded as one of the highlights of the reserve, currently our cycle storage and workshop facilities are housed in temporary buildings and shipping containers which were never intended for long term use. Development would include the complete replacement of all cycle storage and workshop facilities.

Grasslands – Investigation into the current diversity and ecological performance of Grasslands for native species of fauna and flora. Review of current habitat management plan and consideration of new management techniques which may improve some areas.

Education – Expanding on current activities, creating a permanent ‘home’ for education at Watchtree and continually developing interpretation for educational benefit.

Health and Wellbeing – Using existing and new facilities within the reserve to benefit the physical and mental wellbeing of our community.

Environment – Improve our operations to reduce our impact on the environment locally and globally.

Additional possibilities, ideas and proposals were also identified, although these were not currently considered priorities. For further development, these ideas must meet our values and objectives whilst having no detrimental effect on us progressing in the areas listed above.

5.0 Objectives and Key Performance Indicators

5.1 General Management

5.1.1 Maximise the effectiveness of Directors, staff and volunteers. This should be achieved through nurturing personnel wellbeing, motivation, and support.

Objectives

- Develop and implement salary bands relating to position in workforce structure, experience, training, and responsibility (2024 onwards)
- Pay all staff with a fixed hours contract a minimum of the Real Living Wage (2024 onwards)
- Reinvest a minimum 5% of annual turnover (or equivalent value where training is funded) into staff and volunteer training (2025 onwards)

Key Performance Indicators

- Staff and volunteer retention
- Staff and volunteer performance
- Total number of staff (FTE)
- Volunteer Hours

5.1.2 Achieve and maintain financial sustainability

Objectives

- Maintain annual financial sustainability for the organisation

Key performance Indicators

- Financial accounts

5.1.3 Re-invest the real and financial assets of our organisation to maximise achievement of our charitable objectives and develop existing/new income to improve sustainability.

Objectives

- Identify priority projects and commit proportion of reserve funds (2023)
- Supplement all future project investment with external funding through grants, donations, sponsorship, crowdfunding etc.
 - Minimum contribution of 75% from external funding for all future development projects.
- Maintain reserve funds equal to 1.5 times annual turnover (immediate and on-going)

Key Performance Indicators

- Annual grant funding achievement
- Sponsorship and donor performance

5.1.4 Develop board of Directors to attract new talent from a range of fields and interests to secure the future management of the reserve

Objectives

- Review our Articles and Memorandum to ensure that the board of Directors is duty bound to evolve with the organisation by 2025 and then at 5-year intervals
- Recruit one new Director with relevant skills, interest and experience every 2 years.

- Identify skills and experience that are missing from the board of Directors and recruit accordingly

Key Performance Indicators

- Number of Directors
- Director Skills analysis

5.2 Marketing

5.2.1 Actively promote our achievements and charitable work. Raise our profile as a charitable organisation in the community.

Objectives

- Engage all available marketing platforms to communicate with our audiences using various forms of content
- Increase donation box contributions by 5% annually for 5 years and then maintain (2023)
- Raise awareness of Watchtree Nature Reserve within the business community to increase corporate supported projects by 1 per year from 2023 for 5 years and then maintain.

Key performance indicators

- Sponsorship and donator performance
- Donation box contributions
- Number corporate supporters and value

5.3 Events

5.3.1 Increase quantity and quality of events to improve community health and wellbeing, education and raise funds.

Objectives

- Increase quantity of nature themed events to a minimum of 1 per month then maintain (2025 onwards)
- Increase participation in health and wellbeing events by 10% per year for 3 years and then maintain (2022)
- Increase hosting of events for 3rd part organisers; in-line with our own objectives, by 50% (2025)
- Increase revenue from all events by 5% per year (immediate and ongoing)

Key performance indicators

- Quantity of events
- Participation in events
- Revenue from events

5.4 Education

5.4.1 Continue to increase the quality and quantity of education for all at Watchtree

Objectives

- Increase reserve-based interpretation for education of general visitors to include new topics such as Renewable Energy and Habitat Management/Conservation (immediate and ongoing)
- Increase participation in formal school visits by 30% and then maintain or increase (2024)
- Achieve financial sustainability for educational activities through increase of commercial sessions and/or external financial support i.e. grants by 2023

Key Performance Indicators

- Quantity of school session attendees per year
- Revenue from Education activities

5.5 Watchtree Wheelers

5.4.1 Improve the cycle fleet to increase the quality and quantity of cycles available for hire

Objectives

- Replace all substandard cycles and adapted bikes creating a high quality, fully functioning fleet (2024)
- Maintain high standard of fleet and keep up with cycle technology by continual servicing and turnover (from 2024)

Key Performance Indicators

- Number of high-quality cycles in fleet
- Number of new cycles brought into the fleet annually

5.4.2 Improve cycle hire storage, workshop, and associated facilities to improve beneficiary experience, increase income and improve workforce efficiency

Objectives

- Replace current cycle storage and workshop with new, permanent structure (2025)
- Increase indoor, dry storage to include sales areas for new, used, and donated bikes (2025)

Key Performance Indicators

- Condition of storage, workshop, and office facilities.

5.4.3 Increase quality and quantity of cycle use to improve/increase beneficiary health and increase income

Objectives

- Increase cycle hire throughput from 7500 to 12000 and then maintain (2026)
- Increase cycle hire participants from 3000 to 4800 and then maintain (2026)

Key performance Indicators

- Cycle hire throughput

- Quantity of individual cycle hire participants

5.4.4 Increase revenue generated through Watchtree Wheelers to support the overall financial sustainability of the reserve

Objectives

- Increase sales of new, ex-hire and donated cycles by 10% each year for 6 years and then sustain.
- Increase revenue generated through cycle servicing and repair by 10% each year for 6 years and then sustain.

Key performance indicators

- Cycle sales turnover
- Cycle service and repair turnover

5.5 Habitat and Estates

5.5.1 Improve storage, workshop, and associated facilities to increase ability to maintain reserve, and improve workforce efficiency

Objectives

- Replace current storage and workshop with new, permanent structure (2025)
- Increase indoor, dry storage to include trailers, all machinery, and materials such as fencing/structural timber (2025)
- Create outdoor work area for hot works, cleaning of machinery, storage of dry substrate materials (2025)

Key Performance Indicators

- Condition and suitability of storage, workshop, and office facilities.

5.5.2 Improve matrix of habitats across the reserve and increase local ecological importance

Objectives

- Analyse the Defra ecological reports and other relevant wildlife reports to establish the present status of the key species and habitats by 2025.
- Identify potential for increasing biodiversity and creation of key habitats using the data acquired in historical ecological reports
- Create and implement new habitat management plan objectives based on the outcomes of baselines and opportunities identified in the two previous points

Key Performance Indicators

- Ecological survey results
- Quantity of new habitat and species management objectives

5.6 Visitors Centre and Café

5.6.1 Continue to improve and increase the standard and quantity of catering services across the reserve to improve beneficiaries' visit experience and increase revenue

Objectives

- Increase revenue from catering outlets by 5% annually up to 25% and then maintain
- Increase catering initiatives to raise revenue, for example catering for kid's club sessions, natural history events, 3rd party events hosted at Watchtree, birthday parties
- Achieve 5* environmental health classification and maintain (2022)

Key Performance Indicators

- Condition of catering outlets
- Environmental Health Score
- Catering revenue
- Catering initiatives

5.6.2 Improve the range of food and drink on offer to incorporate healthy options and 'free-from' range to improve visitor experience and increase inclusivity

- Develop current menu to include and promote a range of low-calorie meals and snacks by 2023 and then maintain
- Develop current menu to increase range of meals and snacks which are 'free-from' the 14 most common allergens as identified by Environmental Health by 2023 and then maintain

Key Performance Indicators

- Catering services menu and sales records

5.7 Health and Wellbeing

5.7.1 Improve and increase the standard and quantity of formal Health and Wellbeing Services at Watchtree

Objectives

- Increase participation in specific Mental Health sessions to an average of 15 participants per month by 2024 and then maintain or increase
- Introduce new, specific health sessions to improve physical and mental wellbeing using other facilities within the reserve's spectrum, including but not limited to natural history, cycling and volunteer work by 2024

Key Performance Indicators

- Quantity of specific Mental Health participants
- Introduction of new health sessions
- Diversity of session content

5.7.2 Improve working relationship with NHS (National Health Service) to increase social prescribing referrals and opportunities

Objective

- Develop social prescribing pathways to forge a direct link between GP surgeries and Watchtree services by 2024
- Diversify prescribing pathways to include other NHS services outside of GP practice, such as amputee services (specialist unit in Carlisle), weight loss and physiotherapy

Key Performance Indicator

- Setup of direct prescribing pathways
- Quantity of direct prescribed patients

5.8 Environmental Sustainability

5.8.1 Reduce the impact of our operations on the environment through production of energy

Objectives

- Reduce reliance on fossil fuels by 70% by 2025 primarily through the replacement of our current ATV.
- Increase production of renewable energy to power all our own electrical demand by 2030

Key Performance Indicators

- *Quantity of fossil fuels used*
- *Quantity of energy produced*

5.8.2 Reduce the impact of our operations on the environment through improved management of waste

Objectives

- Reduce landfill waste to 20% of all waste by 2025
- Increase responsible disposal of waste through reusing or recycling to 80% of all waste by 2025

Key Performance Indicators

- *Quantity of general waste produced*
- *Quantity of waste recycled and reused*

5.8.3 Reduce the impact of our operations on the environment through improved procurement of consumables

Objectives

- Produce and embed a consumable product purchasing policy which ensures consumable products adhere to our own ambitious standards of environmental sustainability by 2025

Key Performance Indicators

- Implementation of consumable products purchasing policy
- Delivery miles of our consumable products

6.0 Implementation and Monitoring

To ensure the swift and efficient delivery of this plan, the values, behaviours, and objectives set out will be integrated into our policies, procedures, and reporting as follows:

6.1 Implementing Values and Behaviours

A review of our existing policies will ensure that all the behaviours set out in 4.3.1 regarding our general operation are adhered to.

Amendment of our current project proposal and monitoring document will enable us to implement the additional behaviours set out in 4.3.2

6.2 Responsibility for delivery of objectives

It is the overall responsibility of the Manager and Trustees to ensure that we work collectively towards the objectives set out in this plan.

Implementation and monitoring of each objective is the responsibility of a specific area of the business, which has a manager or Team Leader. Tease areas are – Management, Habitat & Estates, Wheelers, Visitors Centre, Education & Wellbeing and Marketing & Events.

6.3 Monitoring of KPI's

KPI baselines for each objective will be established in year one.

Continual monitoring will be conducted and KPI's will be reported upon in our quarterly Management Team Reports.

An annual assessment of progress will take place and form the basis of our annual report.