

## Report of External Funding Manager

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### **Subject: External Fundraising Report**

#### Purpose of Report

To share an overview with Members of fundraising activity against the PCNPA Fundraising Strategy 2018-2021 and set the fundraising strategy for PCNPA for 2021-2024.

#### Introduction/Background

The first Fundraising Strategy for PCNPA was developed in 2018 to cover a 3 year period. This report provides Members with an update of fundraising activity for the last 3 years and shares with Members the recommended strategy for fundraising at the Authority for the next 3 years from 2021-2024.

#### Key recommendations to note:

- The main focus for fundraising for PCNPA should continue to be statutory (exchequer) grant funding, as this remains one of the largest channels of grant funding available to the Authority, alongside Big Lottery funding.
- To maintain the current MOU with PCNPT.
- To maintain the current Sponsor a Gate scheme

Appended to this report is the PCNPA's draft Fundraising Strategy 2021-2024 for review and comment and the Competitive Grant Tracker to give Members further details on the competitive grants secured from 2018 to date.

Please note, this report does not share updates on activity prior to 2018, neither does it report on the Authorities wider income generation programme.

#### Financial considerations

No additional/new financial considerations at this time.

#### Risk considerations

No additional/new risk considerations at this time.

#### Compliance

No additional/new compliance considerations at this time.

#### Human Rights/Equality issues

No new human rights or equality issues at this time.

Biodiversity implications/Sustainability appraisal

N/A

Welsh Language considerations

No additional/new Welsh language considerations at this time.

Wider implications

N/A

Conclusion

This report shares a review of fundraising activity over the last 3 years for information and context for Members, it goes on to make recommendations for the Fundraising Strategy for the next 3 years, for Members to consider and if in agreement, approve.

**RECOMMENDATION:**

**To comment and approve the PCNPA Fundraising Strategy for 2021-2024.**

Background Documents

Anything published previously in relation to this report (e.g. previous reports to Authority/Committee, consultation reports, related publications, etc.)

- [NPA – REPORT 05/18](#)
- [NPA - REPORT 19/18](#)
- [NPA – REPORT 36/20](#)
- [NPA – REPORT 35/21](#)

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## **Fundraising Strategy 2021-2024** **Pembrokeshire Coast National Park Authority**

Prepared by Nichola Couceiro  
September 2021



### **Executive Summary**

This strategy reviews the last 3 years of fundraising since the Fundraising Strategy was discussed by Members during the fundraising workshop and outlines the approach the Pembrokeshire Coast National Park Authority (PCNPA) will take to fundraising over the next 3 years (2021-2024). Since December 2017, the following income has been generated through fundraising. This document highlights the work of the External Fundraising Team and Officers from across the Authority from December 2017 to August 2021 and makes recommendations for future fundraising at the Authority.

<b>Source</b>	<b>Income generated to date</b>
Competitive Grant Applications*	£1,375,656
Pembrokeshire Coast National Park Trust (PCNPT)	£180,243
Sponsor a Gate	£31,100
Sustainable Landscapes, Sustainable Places Grant Scheme	£1,880,000
<b>Total</b>	<b>£3,466,999</b>

#### **Addition points to note:**

- As a public body the Authority is limited in who it can make applications for funding to. The majority of funding received through competitive grants is from statutory sources. A full list of successful grants under this source is included as Annex A.
- These figures are accurate as of end of August 2021.
- These figures do not include additional funding grants received directly from Welsh Government, where some external funding resource may have been used to complete proposal forms.
- The Authority was successful in securing grant funding prior to this strategy, further details of which can be provided by the Finance Team.
- The Fundraising Strategy is one stream of income generation at the Authority. There are other key income streams like our Centres, the National Park Partnership these are not reported in this document.

In January 2018 the Authority discussed the Fundraising Strategy and the objectives remain principally unchanged; with one addition of helping to support the delivery of the new PCNPA vision and priorities.

Outlined below are the overarching objectives of the Fundraising Strategy:

- Raise restricted and unrestricted funds to support the work of PCNPA
- Increase the number of individuals and organisations that support and engage with the work of PCNPA and the National Park
- Ensure that new income streams are sustainable year on year
- Carry out income generation in line with PCNPA’s purposes
  - To conserve and enhance the natural beauty, wildlife and cultural heritage of the National Park
  - To promote public understanding and enjoyment of the special qualities of the National Park

And its duty to foster the economic and social well-being of communities living within the Park.

**Key Recommendations from the Fundraising Strategy 2018-2021:**

1. Set up a Pembrokeshire Coast National Park Charity
2. Invest in a CRM – Supporter Database
3. Invest in a new website for the Charity
4. Complete an audit of all current and pipeline projects carried out by PCNPA. Prioritise projects based on alignment with the Corporate and Management Plan and complete a gap analysis exercise.
5. Test multiple ways of raising and giving simultaneously, to establish which areas are most successful for PCNPA.

**Summary of activity delivered in 2018-2021**

***1. Pembrokeshire Coast National Park Trust (PCNPT)***

As recommended in the 2018-2021 Fundraising Strategy the Pembrokeshire Coast National Park Trust was created. The Trust launched in spring 2019 and has a board of 6 independent Trustees. A [Memorandum of Understanding \(MOU\)](#) between PCNPA and PCNPT was developed. The MOU outlines the commitment that each organisation makes as part of an initial 5 year agreement.

The External Funding Manager and Grants and Funding Officer are seconded for a total of 30 hours per week to run the charity. Since launching, PCNPT has generated the following income to support project and people in the National Park.

	2019.2020	2020.2021
Income Generated	£58,246	£61,546

Projects Supported	<ul style="list-style-type: none"> <li>• Invasive Non-Native Species</li> <li>• Roots (Education programme)</li> <li>• Outdoor Schools</li> <li>• Access Improvements</li> </ul>	<ul style="list-style-type: none"> <li>• People, Paths and Pollinators</li> <li>• Roots (Education programme)</li> <li>• Make More Meadows</li> <li>• First 1,000 Days</li> <li>• Archaeology Volunteer Uniforms</li> <li>• Wildlife Camera at Castlemartin</li> </ul>
Projected income for 2021.22 is £100,000 and over £60,000 has already been secured to the end of August 21.		

In launching the charity certain areas of fundraising are now delivered by PCNPT and not PCNPA, full details of this can be found below.

## **2. Invest in a Customer Relationship Management (CRM) – Supporter Database**

Following PCNPA's process of procurement the ThankQ CRM database was procured by the Authority in 2018 and is licensed on an annual basis.

The database is used by both PCNPA and PCNPT to securely store supporter and volunteer data. The database allows Officers to log;

- Communications and communication preferences in line with GDPR
- Contact details
- Donation information
- Language preference
- Funding applications and outcomes
- Volunteer involvement
- Sponsor a gate information
- Sustainable Development Fund

The database currently holds more than 1600 supporter contacts and this number is growing daily.

## **3. Invest in a new website**

Since the development of the Fundraising Strategy in 2018 both PCNPA and PCNPT have launched new websites:

PCNPA – [www.pembrokeshirecoast.wales](http://www.pembrokeshirecoast.wales)

PCNPT – [www.pembrokeshirecoasttrust.wales](http://www.pembrokeshirecoasttrust.wales)

One of the main requirements for a new website from a fundraising perspective was the ability to take donations online, as well as improve the supporter journey and mobile/tablet optimisation.

The Trust's website uses Enthuse to facilitate this function and manage the complete payment process. Enthuse also claims Gift Aid on behalf of the charity, reducing the administrative burden of this process on Officers and increasing each 'gift-aid able' donation by 25%.

In addition to the donation function, the new Trust website is mobile and tablet optimised, has the ability to capture data through sign up forms, as well as host video content.

**4. Complete an audit of all current and pipeline projects carried out by PCNPA. Prioritise projects based on alignment with the Corporate and Management Plan and complete a gap analysis exercise.**

The prioritisation of projects process was launched in summer 2018 to assist the Authority with prioritising new projects for external funding or additional income opportunities. Officers from across the Authority can submit new project proposals to be reviewed and scored. If prioritised as a Band A project, external funding will be pursued in order to fund the delivery of the new project. In addition to this the Asset Management Group play an important role in reviewing the feasibility of prospective capital projects and delivering all capital projects approved.

Since launching in summer 2018 there have been 8 project submission windows. In total there have been 46 projects submitted by Officers and of those 26 were prioritised for funding.

To date the following projects have been part or fully funded:

<b>Project Name</b>	<b>Funding Period</b>
First 1,000 Days	1 year pilot – 2021.22
Paths, Plants and Pollinators	3 year project – 2019.22
Pembrokeshire Outdoor Schools	2 year project – 2019.21 academic year
Accessible tourism info and resources	1 year – feasibility study
Stitch in Time	3 year period – 2019.22
Walkability/Walking for Well-being	4 year period – 2019.23
Beach Roadshow	1 season – 2021
Pathways 2/Roots to Recovery	3 year period – 2021.24
Sequestration	Currently 2020.21, 2021.22
Carew Millpond Futures	1 year surveying 2021.22
Conserving the park	Part funded annually
Traditional Boundaries - Tree and Woodlands in the Landscape	Part funded annually
Damsels in Distress	1 year 2020.21
Discovery Points	1 year 2021.22

Surveying the Welsh Environment for Pollution Threats	1 year surveying 2021.22
On the trail of Adders	1 year 2021.22
Electric Cars	Purchase of cars – 2021.22 through SLSP and WG Energy Services Grant

More recently, in July 2020, there was a request to Officers and Members for large-scale project ideas, with a delivery cost of more than £500,000. There were nearly 50 project ideas submitted. These are currently being sorted into themes and the next stage of development to be agreed by Senior Management Team and will provide ideas for future fundraising priorities.

### **PCNPA Fundraising 2021-2024**

Based on insight gathered in the last 3 years of fundraising at the National Park, outlined below are the fundraising priorities for PCNPA for the next 3 years and a breakdown of planned approach under each income stream.

#### **Priorities**

1. Prioritise statutory trust fundraising to generate income to fund PCNPA prioritised projects.
2. Continue to support PCNPT under the terms set out in the MOU.
3. Maintain the prioritisation of projects process; improving the process where required to ensure it still meets PCNPA's needs and enable large scale project ideas to be developed.
4. Continue with Sponsor a Gate scheme.
5. Continue to review the ROI of contactless giving with the option to roll-out the scheme to other key venues or points in the National Park.

#### **Individuals**

1. PCNPT – the majority of cash income generated from the public through individual giving should be delivered through the charity. There are a number of reasons for recommending this approach:
  - a. PCNPT is better positioned to market PCNP as a 'cause' and provide a degree of separation from the statutory function of PCNPA.
  - b. PCNPT as a charity is Gift Aid registered, which can generate an additional 25% of income on each donation given; subject to donor and donation eligibility.
  - c. PCNPT has an online payment platform for member of the public to donate directly to the cause on a one-off, monthly, quarterly or annual basis.

- d. PCNPT is set up for Text Giving, so those that would rather make a donation through their mobile, can do so, on a one off or monthly basis.
2. Contactless donations/cash donations - these are received by visitors to Oriely Parc although in the last 18 months this income stream has been heavily impacted due to the pandemic and restrictions including centre closures and limits on visitor numbers. It is recommended that PCNPA track how much income is generated by this source over the next 12 months and based on ROI decide whether to continue with contactless giving alongside cash donations. Secondly, if sufficient funds are generated whether to expand cashless giving through licensing more than one machine to have them present at other sites in the National Park.
  3. Growing the database – continuing to grow the supporter database (ThankQ) for both PCNPA and PCNPT is critical to growing income from individuals. There are a number of ways PCNPA could be better utilise ThankQ for this purpose:
    - a. Centres could be storing supporter contacts on ThankQ.
    - b. Individuals who sign up to PCNPA newsletter could be stored on ThankQ.
    - c. PCNPT – growing the number of supporters on ThankQ is a key priority for the charity and a focus of its marketing and advertising activity.

It is recommended that PCNPT remains the main source of cash income from individuals, but that contactless giving is monitored over the coming year to decide whether the scheme should be maintained and/or potentially expanded by leasing further machines to generate more income.

*Key Dependencies:*

- PCNPT to continue to grow this income stream and use funds generated to support charitable purposes and projects in the National Park.
- Maintain investment and annual licence in ThankQ.
- Whether Centre Managers and Communications Department wish to utilise the ThankQ database to store contacts.
- Oriely Parc continues to home the contactless payment machine.

*Key Risks:*

- External funding resource and capacity to continue to grow income year on year without additional staff time and project officer time to develop new projects ideas and support in the delivery.



- Individual fundraising is admin heavy and as the number of supporters giving regularly increases, so will the amount of time needed to process and acknowledge these supporters.
- PCNPA does not extend MOU with PCNPT.
- PCNPA does not renew annual licence for ThankQ.

## **Campaigns**

Following the launch of PCNPT all fundraising campaign have been launched and promoted by the charity and it is recommended that this approach is maintained.

Currently PCNPT has proactively promoted the following campaigns with the support of the PCNPA Communication Team, for the benefit of the National Park:

- Make More Meadows – this is the fundraising campaign that launched the charity and focuses on maintaining and increasing wild flower meadows across the National Park. This funding supports the National Parks – Conserving the Park the scheme and to date has generated over £15,000 to year end 2020.21. PCNPT will continue promoting Make More Meadows on an annual basis with a fundraising target of £10,000 annually.
- Wild About Woodlands – this campaign was launched as part of a partnership with Millie Marotta, starting as a £10,000 appeal to plant 1,000 trees in boundaries and hedge banks across the National Park.
- Pembrokeshire Coast Path – this is an approved campaign for PCNPT but to date has not be proactively marketed or promoted, as currently there isn't a project in this area that requires external funding as the Coast Path is currently 100% funded by WG/NRW.

### *Key Dependencies:*

- Marketing and communication support from the PCNPA Communication Team for promoting the campaigns with press releases and website support,
- Service delivery staff to develop new project ideas and deliver the project once funding is secured.

### *Key Risks:*

- Do not extend MOU with PCNPT
- Insufficient external funding resource to promote and manage the campaigns
- Failure to delivery outcomes of the campaigns e.g. hectares of meadows created and number of trees planted.
- In converting campaigns to annual appeals, this could limit the number of funders looking to support the work some funders have strict rules on new projects only. Also from a public appeal perspective this isn't something 'new' or 'urgent' that people can support.

### **3. Trusts & Foundations**

Since April 2018 more than £3,466,999 has been generated from grant applications to fund more than 20 different projects across the Pembrokeshire Coast National Park. Full details of the successful grant applications and the amount of funding awarded can be found in the [Grant Funding Tracker](#). Please note this includes grants made by PCNPT to PCNPA to deliver projects in the National Park, as well as grants like Sustainable Landscapes, Sustainable Places, where National Parks are ring-fenced an allocation of funding, but we are still required to make a formal grant application.

It is recommended that PCNPA continues to prioritise this income stream and focus on large scale funding opportunities from statutory grant schemes and other funding bodies that permit application from Local Authorities.

PCNPT will continue to focus its grant fundraising on other trusts and foundations bodies set up to support third sector organisations.

#### **Project Portfolio**

The project portfolio has been instrumental in helping to prioritise projects to seek external funding for. It has also delivered a consistent number of new projects that further the aims and purposes of PCNPA.

The project portfolio is also utilised by PCNPT. Newly prioritised projects are shared with PCNPT's Board of Trustees to seek approval for funding by the charity. Moving forward it is recommended that we keep the prioritisation of projects process, to ensure the on-going development of new projects, but continue to seek Officer feedback about how the process can be improved and also ensure it supports the development of new large scale project ideas.

#### ***Key Dependencies:***

- Project Officers continuing to develop strong projects in need of funding and senior leadership capacity to score and prioritise these projects.
- Board of Trustees to adopt new projects to the charity's portfolio, in order for income generated from the charity to support them.

#### ***Key Risks:***

- Capacity of external funding officer to apply for large grant(s).
- Lack of new statutory funding opportunities due to Brexit/pandemic.
- Increase in competitiveness of grants, leading to lower success rate.

- Not extending the MOU with PCNPT, which would limit the number of funding opportunities available to the National Park, as only funders willing to support Local Authorities.

#### **4. Corporate**

PCNPA is partnered with the National Park Partnership (NPP), which has been set up to secure national corporate partnerships to benefit the whole National Park family. In recent years UK National Park Authorities have set up a charity, the UK National Park Foundation, to support the work of NPP and provide a route for charitable donations from corporate organisations at an UK level. The Chief Executive of the Authority is a Trustee of the Foundation. As a result it remains the case that PCNPA should not target large scale corporates, but instead support the work of the NPP to bring on board these national organisations in order to generate funds for the Pembrokeshire Coast National Park.

NPP doesn't focus on local and regional corporates, instead income from these audiences has been generated and delivered by PCNPT in the last 2 years. It is recommended that this continues to be the case over the next 3 years. PCNPT has recently launched Pembrokeshire Coast Partners, an annual corporate membership scheme and seeks to increase income from this stream over the coming years.

PCNPA will continue working directly with businesses outside of the Authorities fundraising department; through Coast to Coast and a new business ambassador scheme currently in development.

##### *Key Dependencies:*

- Project Officers to provide the additional information required to gain corporate support for their projects.
- PCNPT and NPP.

##### *Key Risks:*

- Do not extend support for NPP.
- Do not extend MOU with PCNPT.

#### **5. In Memory & Legacy Giving**

##### **In Memory**

The Sponsor a Gate scheme has been successful since launching in December 2017. As hoped it has provided an alternative offer to members of the public who would like to place a memorial bench on the Pembrokeshire Coast Path but this option is not available.

Please see below a breakdown of gates/benches sponsored and income generated since launching:

Financial year	No of Gates sponsored	Income generated
2017.18	3	£1,700
2018.19	10	£6,600
2019.20	17	£10,200
2020.21	9	£4,800
2021.22 (YTD April-Aug)	13	£7,800
Total	54	£31,100

To sponsor a gate costs £600 for a 10 year period, the average life-cycle of a gate. Each donor is offered the same small plaque, which would be affixed to their sponsored gate with the following wording on offer:

- Sponsored by...(Insert Name)
- Dedicated to...(Insert Name)
- Donated by...(Insert Name)

All information regarding the 'sponsor a gate' scheme is recorded on the ThankQ database and GIS maps. This ensures PCNPA has a record on when each gate was sponsored and by whom, so when their gate is up for renewal the Authority can contact the individual and ask if they would like to renew their sponsorship.

Due to the success of the scheme it is recommended that we continue to run the scheme and the principles remains unchanged. There are some opportunities to digitalise the scheme in the following ways:

- Explore an online sponsor a gate form
- Add website payment page feature
- Look at options to create an interactive Sponsor a Gate map; with available gates highlighted for the public to see online.

Before implementing any of these digital improvements we will need to ensure that we don't take payment without confirming that their requested gate is available, as this could result in a resource heavy process of refunding people as their chosen gate is unavailable.

If, over the next 3 years we run out of available gates the Authority could look at sponsoring other furniture on the coast path, like signposts. This is an approach some of the other National Park Authorities have taken. We have also had many requests for sponsored tree planting/memorial trees. This could be a campaign run alongside PCNPT Wild about Woodlands appeal.

Key stakeholders:

- ROWIP and Warden team for identifying available gates and affixing the personalised plaques.
- Cilirhedyn Woodland Centre if new gates or benches need to be made.

#### Key Risks:

- Vandalism to the plaques – whilst this has happened on a couple of occasions, it has been manageable to have them replaced or moved to a new location.
- Run out of sponsored gates for the public to support.

#### Legacy

It is recommended that this income stream is promoted by PCNPT. As a charity they are better placed to position the National Park as a 'cause'. Also as a third sector organisation they have a number of external agencies and partnerships that they can work with to help promote leaving a gift in your will. However this will not, and should not restrict PCNPA from receiving any legacy donations; be it cash or land should members of the public wish to donate directly to the Authority.

In the last year PCNPT has worked with Farewill an online will writing service and is committed to testing this channel over the next 12 months, as well as other legacy promotion around remember a charity week and legacy month.

Please note that legacy giving is not an immediate ROI, promotion and marketing in Year 1, will not see results for at least 5-10 years according to sector research. This is why it has been important for PCNPT to prioritise promoting gifts in wills as soon as the charity launched.

#### Key Dependencies:

- PCNPT – to deliver this program of activity and promote to the public leaving a gift in your will, as one of the ways that you can support and safeguard the National Park for future generations.
- On-going financial investment in Farewill and other partnerships that will increase reach and understanding that gifts in wills are one of the ways the public can help safeguard the National Park.

#### Key Risks:

- The length of time that it can take to see the return on your investment. Delays to promoting this as a way of giving, will only delay income being generated from this source.
- Do not extend MOU with PCNPT and the gains for the National Park are never realised, if the charity doesn't exist when legacy pledges are realised.

## **6. High Net Worth Individuals**

As with legacies it is recommended that working with High Net Worth individuals continues to sit with PCNPT and remains a priority area for the charity. They have had some success in this area to date, but there is still a huge amount of development work and potential for income generation from this area of fundraising. The Authority as a Local Government is not well positioned to source large donations from individuals.

Key Dependencies:

- PCNPT
- Wider PCNPA staff and Members to share individuals who they feel may have an interest in supporting the National Park by giving a large gift.

Key Risks:

- Failure to build a strong enough case for support for an individual to part with a large sum of personal wealth.
- Not sufficient number of leads to develop into donors.
- Barriers to developing and delivering projects that high net-worth individuals might want to support.
- Do not extend MOU with PCNPT.

## **7. Events & Community**

PCNPA has a large portfolio of events, with many of these being profitable. It is recommended that these events remain with the teams and departments that they currently sit in.

It is recommended that fundraising events continue to be run by PCNPT as both a means of raising the profile of the Trust's work and to generate sponsorship for event participation as well as gift aid. In addition, PCNPT have also started hosting information events to grow engagement and brand awareness. The charity has a much wider range of opportunities to generate income from this source including the public putting on fundraising events on our behalf, collections, generating income from sponsored events like runs, cycles and triathlons.

Key Dependencies:

- PCNPT – to deliver events and grow engagement through this income stream

Key Risks:

- Putting on events can be resource heavy, need to ensure any events held deliver a solid ROI.

- Do not extend MOU with PCNPT.
- Further lockdowns or restrictions on people gathering in large numbers due to the pandemic.

**Key Recommendations Summarised:**

- To continue to prioritise statutory funding and applications to funding bodies that support Local Authorities.
  - To continue to support PCNPT under the agreed terms in the MOU, to support further income generation for projects and people across the National Park.
  - To maintain the current prioritisation of projects process but ensure it falls in line with the organisational wide approach to project development, making any amends to the process as needed.
  - To maintain the Sponsor the Gate scheme.
  - Continue with the ThankQ database and look at opportunities for other teams in the organisation to use it.
  - To review staff capacity on an annual basis to ensure lack of capacity doesn't become a barrier to generating more income to support prioritised projects in the National Park.
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## Annex A

Name of Grant	Funding Body	Amount Awarded	Grant Period	Project Funded
Regional Tourism Engagement Fund (RTEF)	Visit Wales	£150,000	April 2018 - March 2019	Wales Coast Path Promotion
Tourism Amenity Investment Support (TAIS)	Welsh Government	£53,200	October 2019 - December 2020	Broad Haven Car Park
Tourism Amenity Investment Support (TAIS)	Welsh Government	£22,400	December 2018-March 2020	Drinking Water Fountains
Enabling Natural Resources and Well-being Grant (ENaRW)	Welsh Government	£149,587	April 2019 - March 2022	Invasive Non-Native Species
Healthy Active Fund	Sport Wales	£400,000	April 2019 - March 2022	West Wales Walking for Well-being
Neighbourly Environments Grants	Tkmaxx	£800	April 2019- September 2019	Beach Cleans
Local Places for Nature	WCVA	£39,827	May 2020 - March 2021	Environmental Growth & Greening the public estate
Sustainable Management Scheme - supporting N2K Restoration	Welsh Government	£69,329	November 2020 - March 2021	Fritillaries and Damselflies Project
Cultural Service Fund	Welsh Government	£24,022	December 2020 - March 2021	Carew & CH - COVID Recovery
Local Places for Nature	WCVA	£27,500	April 2021 - March 2022	Wild Coast! -Community Nature Recovery
People and Places - Community Fund	Big Lottery	£339,891	September 2021-August 2024	Roots to Recovery
Nature Network Fund	Heritage Lottery/Welsh Government	£99,100	September 2021-March 2023	Fritillaries and Damselflies Project/Conserving the Park
<b>Total</b>		<b>£1,375,656</b>		