

ROCKINGHAM FOREST TRUST

Date established	1993
Region	East Midlands
Employees	30-40 in peak season
Structure	Company limited by guarantee and charity
Annabel Jackson Associates Ltd role	We evaluated the Rural Community Enterprise Challenge Fund for the Esmee Fairbairn Progress between November 2007 and July 2011

1.1 Background on the Trust

Rockingham Forest Trust was set up to conserve, protect and improve the environment of the 200 square mile area known as Rockingham Forest, to improve the wellbeing of people living in or visiting the Forest, and to advance public education. The forest itself is not owned by the charity, it is part owned by local authorities and private landowners. At Stanwick Lakes countryside attraction and nature reserve, which the Trust has developed and now manages, gravel quarrying ended as recently as 2004, and the site has been recognised as a Site of Special Scientific Interest, internationally acclaimed for its birdlife.

1.2 The social enterprise



Rockingham Forest Trust was facing a period of transformation following the loss of two programmes, a LEADER+ programme (Rockingham Rural Revival) and Heritage Lottery Fund programme (People of the Forest Programme) which together brought in £2 million over six years, and ended in 2009. The move away from grant funding towards earned income would be achieved through expanding the site facilities at Stanwick

Lakes from outdoor walks, adventure playgrounds and a log cabin to a £2.5 million new build visitor centre.

On 3rd April, 2009 the visitor centre opened on time and budget. The building has:

- A Discovery Centre, which has a heritage and environmental interpretation space, as well as a separate utility area, and coat hanging room.
- A function room, divisible into three smaller spaces through partitions, for hire to businesses and residents, with doors onto an outside terrace space with views of the lake.
- A Hideaway play area for young children, that has soft play equipment, with the walls painted to give the impression of being at (and under!) the lake side.

- A café and shop, with an upstairs exhibition space that provides additional seating and archaeological finds displays.
- A large open plan entrance space, containing an overhead display showing bird migration patterns, a replica of a Roman mosaic from the area, information on the building's energy management systems, a camera to watch wildlife around the lake and a brochure display in a bespoke wooden table.

1.3 Planned capacity building

The specific organisational development aims identified in the baseline evaluation were:

- Strengthening the links between the two parts of the organisation that had been located on separate sites so that the operational side had a holistic understanding of the different constraints on the organisation.
- Developing new products such as catering, retailing, corporate training, children's holiday clubs and ethnical/green products.
- Strengthening the skills in the board and staff team to include retailing and customer service.
- Building customer loyalty.
- Reducing dependency on core funders and increasing earned income.

1.4 Support

Before the Rural Community Enterprise Challenge Fund, Rockingham Forest Trust received support in the form of a business review from Pool, the commercial arm of the DTA.

The Rural Community Enterprise Challenge Fund paid for specialist advice from Deloitte on VAT.

The Trust underwent a financial health check from Neil Trup of the DTA.

1.5 Progress

Rockingham Forest Trust has successfully managed its transition. The Trust has replaced the grant funding with earned income. Total income has increased marginally from £773,961 in 2006-07 to over £800,000 in 2010-11. The percentage of income from grant has changed from 70% in 2008-09 to 20% in 2010-11. Total earned income has increased from £163,964 in 2008/09 to over £570,000 in 2010-11. The Trust predicted £11,000 profit in 2009-10, and out turned at £68,000, or £32,000 excluding additional start up funding received. The Trust needs at least £60,000 profit a year to cover the core costs.

The Rural Community Enterprise Challenge Fund has given the director, Alyson Allfree, a window from time consuming fund raising work, to concentrate on managing the transition. Roughly half her time is spent on strategic issues. In the past Alyson would write the copy for the press releases and marketing brochures, but this has now been delegated to a part time marketing coordinator. Forward planning for events has improved. There is an events leaflet

which gives a full account of activities for the whole year. The next stage is to increase visitors' understanding of the Trust and its mission. Alyson is in the process of preparing a capital plan, with expert advice.



The visitor centre had a target of 250,000 visitors a year which it met in its first year. Alyson carried out intensive research before the site and building were developed, visiting ten comparable sites and asking questions of their management, to consider the appropriate niche in the market. As she explains: "You have to be absolutely clear what model you are aiming for and do it well. There is a top end, which is a

countryside attraction, and a bottom end which is a log cabin with toilets. The worst thing financially is to go for a fudge in the middle." Rockingham Forest's visitor centre has a high specification, which is evident from the building, maintenance programme, marketing and customer service. The centre excels on both the range and quality of activities. The peak season cost, £3 per car (increased from £2 before the new development), ensures the Trust maintains its position as high volume, low cost. The brochure uses the strap line: "Welcome to the countryside attraction where the adventure lasts all day!" and characterises the site as "Northamptonshire's most imaginative outdoor activity destination". Two years since opening the building still looks spotless, in part because café and other staff are employed on regular touch ups to paintwork in periods of low activity.

The staff have come a long way on their journey towards operating in a business-like way. Before some staff working on the LEADER+ programme weren't involved in enterprise. Now almost everyone in the organisation has a role in helping to deliver the enterprise whether it is in taking visitors around, or counting money and bagging it up. For example, the former LEADER+ programme manager is in charge of developing activities with special needs groups.

Staff understand the Trust's values, which are: inclusion, sanctuary, adventure and caring for the environment. Alyson took seven senior staff on a fact finding visit to the Eden Project in Cornwall, which provided both inspiration but also team building. Alyson has maintained this initial energy through forming an action task force that meets monthly to consider improvements to the building, educational interpretation, catering and retail, and resource use. Experts are called in to advise this group, as needed. The next stage is to spread customer service training to the casual staff and volunteers.

The Trust has established a separate enterprise board, which has two members from Waitrose. In terms of staffing, the original plan was to have a business development manager but this turned into a visitor attraction manager, which has worked well.

Rockingham Forest has organised a range of activities to encourage use of the site and generate income:

- Dinners, for events such as Valentine's Day.
- Outdoor events, some new and some continuations of activities led by rangers, such as bird walks, butterfly walks, bird box building, an Easter egg trail, fishing tutorial, shelter building, and pond dipping.
- Heritage events such as Iron Age re-enactment and a heritage trail.
- Arts and craft workshops.
- Boating in the summer, organised in new partnership with an adventure centre.

All the original plans were put into action, except the children's holiday club, which was dropped because it would have tied up the Discovery Centre for large periods of time. There were later plans for a wind turbine, which collapsed when previously allocated funding was withdrawn following Government cuts.



The Trust now has targeted activities for different market segments: older groups (ramblers), mums with toddlers (the Hideaway), families (the Discovery Zone), and those interested in heritage and arts and crafts. The Trust has organised targeted promotions with discounts for mums coming to the Hideaway while sitting in the café, and a mail out to walking groups and bird watchers. The latter was a strategic move designed to increase the use of the site in winter. The Trust tried branded items in the shop, mugs and notebooks, but these

have not sold particularly well. More successful has been an explorer pack (rucksack and notebook) developed in partnership with a private sector firm that makes bird seed and animal food.

The reaction from customers has been very positive. There was a possibility of conflict between business and visitors, but this hasn't happened, in part because of the effectiveness of the acoustic ceiling in the function room. The Trust is hosting a wedding fair as a first stage into potentially entering the weddings market.

Key posts are recruited on the open market. However, the Trust is also able to offer employment and volunteering opportunities to disadvantaged people as well as individuals with disabilities or mental health issues.

The social impact has increased greatly during the redevelopment. For example, [young people with special needs/learning difficulties are brought by their carers to take part in the volunteer conservation sessions out on the site with the rangers every Wednesday. They have the chance](#)

to learn new practical skills and to mix with others from both similar and completely different backgrounds and ages. The rangers lead education sessions for schools in the spring/summer and early autumn, with around 1,500 children from 4 years to 16 years old taking part each year. They also run pond-dipping sessions for scout/youth groups and families in the school holidays. The café and shop provide work experience to young people on job seekers allowance, who then have something to put on their CV. Several have gone on to gain employment in this way, having previously been unemployed for more than a year. Local schools send year 10 students to undertake work experience assignments usually for a two week placement. Around 25 young people from the local area are employed on a casual basis in the peak season as cleaners, and catering and shop staff.

The site offers opportunities for people of all ages to take part in a wide range of different tasks: picking up litter or helping the rangers with practical conservation, making cakes, serving in the shop or in the reception, helping in the Discovery Zone, or helping with events on everything from willow raft making to Halloween hats.

1.6 Lessons

Alyson's lessons are:

"You have to have a vision and stick to it. All the time people make suggestions of what you should be doing and it is easy to be swayed by them." You need to be very clear about the balance between the charitable and commercial sides of the Trust.



"It is easy to think that a building will be the answer to all your prayers." This is only so if it is on the right terms. Alyson is very pleased she stuck to her commitment to raising grants rather than loans. "We shamelessly milked our connections. Who you know is as important as what you know."

"People confuse the social with the enterprise. We try to be clear." For example the Trust does not let charities hire space at a discount. There are a range of different spaces, so they can find the right space, at the enterprise rate. The café is not expensive, but it is not subsidised.

"The challenge is to keep the momentum up, not to sit back on our laurels."

"We need to ensure we are sufficiently profitable to reinvest. One of the things you notice from comparable sites, is that they die away because they start to look shabby or old fashioned. We need to be ahead of the game." The visitor manager used to run a theme park so he is very commercial.

"One of the secrets of success is to think big. You either have to think very small, or be pretty professional. It is the middle ground that loses money."

“If you are determined you can be entrepreneurial. It will change what you are about.”

“Go and see what other people are doing. The Rural Community Enterprise Challenge programme has been excellent because it has put us in touch with people who have practical experience. There are lots of people who will tell you about theory. Knowing what other people are doing makes you feel more confident.”

Alyson’s vision for the future is to find a way of having satellite projects that link back to the main site. She would also like to provide an holistic service for work placements, for example including basic skills, so that they have a greater chance of finding employment.

1.7 Conclusion

Rockingham Forest Trust has managed a challenging transformation smoothly and elegantly. The vision was ten years in the making, but the financial restructuring was achieved within three of years. That the vision was highly ambitious might have strengthened its case, although a contributing factor was undoubtedly the timing during a period when capital funding was available. The EF funding played a crucial role in allowing the Director to focus on income generation and culture change with essential benefits for cash flow. The funding also paid for specialist advice on VAT, an unpredicted problem which could have been financially crippling.

The public benefit from the project is high, both in terms of the number of people reached and the depth of the impact on their lives. Overall, this case study illustrates how Development Trusts can deliver the Big Society: inspiring employees and volunteers to work together to provide professional services of a high standard with a caring and fun ethos and a distinctively local character.