

**Visitor Giving:**

A toolkit for Destination  
Organisations



## Visitor Giving: A toolkit for Destination Organisations

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## Visitor Giving: A toolkit for Destination Organisations

Visitor Giving, also known as Visitor Payback, or Visitor Gifting, is a simple way of inviting voluntary donations from visitors, inspiring them to put something back into looking after the places they love to visit.

Tourism businesses of all types are perfectly placed to collect the contributions which their customers feel moved to give. Whatever type of tourism related business is involved in the scheme, there will always be a simple method of setting up Visitor Giving to provide benefits for everyone living and working in the destination.



Visitor Giving is a way of offering visitors to both countryside and town, the opportunity to give a little something back to looking after the places they love. It's a way of tapping in to that natural desire to help and a mechanism for collecting those small contributions which, collectively, add up to something really quite significant.

The money raised can go towards supporting a whole host of projects in destinations, all delivered by the many committed organisations who are working hard to protect England's landscapes, maintain local communities and promote our heritage.

### How to use this toolkit

This toolkit has been designed to be read as a whole document or as individual helpsheets. We would suggest that you read in order unless you have a specific interest area in which case please go direct to that helpsheet. It comprises a suite of nine helpsheets to aide Destination Organisations and others in managing Visitor Giving in destinations:

1. What is Visitor Giving.
2. Building partnerships between visitors, environment, residents and business.
3. Marketing Visitor Giving.
4. Effective use of technologies for Visitor Giving.
5. The Business Model.
6. Tax, VAT & financial matters.
7. Transparency and accountability.
8. Resources & support.
9. Case studies.

## What is Visitor Giving

The landscapes of England have something for everyone. Our historic villages, towns and cities have long held a great fascination for those who choose to visit, offering a beguiling window that links our past with our future. Add into these vibrant and welcoming communities and you have a great destination mix for our visitors.



The abundance of culture, heritage and spectacular scenery on offer draws millions of visitors to our towns, countryside and coast every year for adventure, quiet enjoyment and some soulful recharging. "And that's great - because the Visitor Economy is essential to England's economy worth £97 billion each year, employing in excess of two million people and supporting thousands of businesses, both directly and indirectly." However, with so many footsteps on paths,

cars on roads, and people in the landscape, some impact on our natural environment and local communities is inevitable. It's all about finding a balance between encouraging tourism to support local livelihoods, and protecting and conserving the environmental assets which entice so many people to visit this truly wonderful country.

Ultimately visitors should be able to enjoy the outstanding landscapes, wildlife, culture and heritage England has to offer today without compromising the ability for people to continue this enjoyment tomorrow and into the future. And by keeping those visitors coming, tourism can keep putting pounds in the pockets of the tourism businesses that support the livelihoods of so many local people.

Visitor Giving is a way of offering visitors the opportunity to give a little something back to looking after the places they love and a way of providing a mechanism for collecting those small contributions which, collectively, can add up to significant amount of funding.

Visitor Giving isn't a one-size-fits-all type of scheme - but that's one of its great strengths. It's creative, flexible and multifaceted and can work in many different ways in any destination and across a wide range of tourism businesses. Indeed any business which has guests or customers can operate Visitor Giving.

## How it works

Fundraising via Visitor Giving in a destination is flexible and the businesses involved will be able to choose what works best for their particular operation. Visitor Giving offers a variety of 'giving' options which can be tailored to suit the values, ethos, brand and image of any business.



The most successful and popular method of Visitor Giving is called 'Opt In'. Guests are invited to make a voluntary contribution (usually £1 or £2) which is added to their bill either at the point of booking or to their final invoice. Opt In can easily be incorporated into online booking systems as a 'booking extra' or added to the final invoice. Guests are offered the chance to 'Opt In' making the donation should they wish to do so.

Experience shows that 95% of people are more than happy to make the donation. Once set up, this is low maintenance, involving very little administration for everyone involved but raising lots of money for the chosen project.

The Langdale Estate has raised almost £190,000 for upland path repair and maintenance, supporting 'Our Man at the Top' by inviting time-share owners to donate £10 through their annual maintenance and by adding £2 to hotel bookings.

*"We rely on our stunning landscape to draw visitors to this beautiful county. The question we should ask ourselves is not, "why should my business get involved" but simply "why not?""*

Nick Lancaster - Operations Director  
Langdale Estate and Country House Hotel

## For visitor attractions and event organisers

Visitor attractions and large scale events lend themselves to a ticket or entry fee 'levy scheme'. For example, ten or fifty pence or even a pound added on to the price of each entry or trip is donated via the Visitor Giving scheme.

Epic Events raised £1,300 from the 972 cyclists who took part in the Eden Valley Epic by inviting a £2 voluntary donation on each entry fee. The money is supporting 2 local community conservation projects restoring a wildflower hay meadow and creating community woodland.



*"We are committed to putting something back into looking after the landscapes and communities which host our events."*

Marc Laithwaite - Director  
Epic Events

## For retailers, restaurants and cafes

Retail and food and drink businesses lend themselves to fundraising via a 'sponsored product'. In this instance, a donation of a small amount is added onto the price of a product, for instance ten pence on a cup of tea, a pound on a pair of hiking boots or twenty pence on the cost of a scone.

Individual businesses can be really imaginative and quirky with this type of fundraising to encourage their customers to make a donation.

Sarah Nelson's Grasmere Gingerbread has raised over £1,500 from imaginatively packaging small bags of gingerbread crumbs - a by-product of the baking process.

*"It seemed a great way of helping to protect the National Park which so many of us rely upon for our livelihoods."*

Joanne Wilson, Manager  
Sarah Nelson's Grasmere Gingerbread

David Jackson, Castlerigg Hall Camping & Caravan Park realised that many of his customers were going fell walking whilst holidaying at his campsite.



Sarah Nelson's Grasmere Gingerbread

He believed that they would give willingly to a project that helped to look after the very paths which they were using to get to the fell tops. He decided to add a voluntary donation of just £1 to every booking made at the camping and caravan site to support a project called Fix the Fells.

He was right and in the last 8 years, his business has raised almost £8,000 to support the care and maintenance of upland paths in the Keswick area.



There is no doubt that the general public are very willing to contribute money to places with which they have a strong empathy and which they care about safeguarding for the future.

The success of the National Trust is great evidence of this characteristic. Linking people with place by informing them of the local issues and needs and seeking their involvement and ownership in the solutions is a great way of building and strengthening your visitor's loyalty to your destination.

### Building partnerships between visitor, environment, resident and business

Embedding Visitor Giving into destinations and local business can help build stronger links between visitors, the environment, residents and businesses, helping to make tourism more sustainable in the longer term.



A relaxing, or active break amongst some of the most outstanding towns and countryside in the world is often a time when visitors are really receptive to learning more and understanding more about the place they have chosen to visit. A Visitor Giving scheme operating in the destination allows for positive messages to be promoted about how visitors can help look after the places they love. Understanding the pressures and issues affecting a destination and being offered the opportunity to make a difference through making a donation can instil in visitors feelings of 'investment' and 'ownership' in that destination, encouraging them to return and recommend the areas to others. Nurturing this caring relationship between visitor and landscape, which Visitor Giving 'brokers', enhances not only the visitor experience, but also that of residents who can see the benefits that tourism in their destination is bringing to their local communities.

#### Connecting people with places

Visitor Giving is great way of demonstrating, through practical action, that tourism, community, business and environment need not all be mutually exclusive. Indeed Visitor Giving provides an excellent platform to increase understanding between the needs of tourism, the needs of the local environment (both people and place) and how both sectors can work together for positive outcomes.

Visitor Giving offers an opportunity to educate and raise awareness with visitors of the issues affecting our local environments and how tourism and communities can form a collaborative partnership to make a real and tangible difference, supported by the generous donations of customers in destinations around the country.

#### Winning hearts and minds

Visitor Giving works best when customers feel a 'hearts and minds' connection to the project they're being encouraged to support and many communities have a strong sense of identity and pride in their local area - a real sense of place.

Visitor Giving provides a medium through which to shout about what's great about a local area and, through doing so, harness the good will of visitors, residents and businesses alike to make a real difference in partnership by joining together to provide the essential funds and resource to support local projects.

*"67% of respondents to a 2010 VisitEngland survey on consumer attitudes to Sustainability agreed that 'protecting the environment is something which individuals should take responsibility for'."*

Moreover, 58% said that they were very interested in staying in accommodation with green awards and/or environmentally friendly practices.

Source: Sustainable Tourism - Consumer Research 2010, VisitEngland

### Working in partnership

In many cases, particularly in rural destinations, local residents are also the same people who own and run the local businesses and positive relationships between the business and environment, communities, private, public and third sectors, can be fostered through a well-managed Visitor Giving scheme.

Linking local businesses to fundraise for local projects increases awareness and understanding of the challenges facing each, whilst also opening up a dialogue which leads to collaborative working which can provide positive benefits for all.

For example, many businesses engaged in Visitor Giving will often arrange for staff to have a site visit to, or a presentation from, the local project they're supporting. Most local projects are more than delighted to have the opportunity to talk about where the Visitor Giving fundraising money is going and the difference it's making. This sort of interaction also helps to create a sense of 'ownership', common purpose and partnership between business and project and ultimately staff in the business are more confident when talking with guests and customers about the project which they are supporting through a Visitor Giving Scheme. This in turn helps to generate more donations.

### Visitor Giving in action, an example

Persistent flooding at the Howtown Jetty on Ullswater meant that walkers were frequently stranded on the wrong side of the lake unable to reach the boat to travel back across the lake. To remedy this problem, boat owners, Ullswater Steamers, local landowners and staff from Nurture Lakeland came up with an innovative solution which extended the jetty to provide year round access no



Ullswater Steamers

matter what the water levels and at the same time created a new more accessible way onto the jetty and boats for less mobile visitors and wheelchair users. And how was all this funded?

A three way collaboration with the Steamer Company and the National Park both providing some of the funds needed and this being matched through the Visitor Giving scheme meant that the problem was soon resolved in a long term sustainable way meaning no more stranded walkers and a resumption of normal service for the boat company!

### Visitor Giving in action

#### Warton Crag Nature Reserve

Each year, Lancaster House Hotel in North Lancashire, take their staff on a practical conservation day to Warton Crag Nature Reserve, the project for which they're raising money through a Visitor Giving 'opt-in' scheme.

Staff from Lancashire Wildlife Trust, which manages the Nature Reserve, share their knowledge and enthusiasm whilst everyone has a memorable day, getting their hands dirty and strengthening the relationship between donor and project.

Ultimately Visitor Giving can offer everyone involved a more positive and rewarding experience connecting people with place for the good of our landscapes, wildlife and heritage today, tomorrow and right into the future.

The role of a Destination Organisation (DO) is to foster these partnerships and collaborations and to support the development of the Visitor Giving network. This role might also extend to providing expertise on promoting the scheme and/or leadership on how it is developed.



Tree planting at Orton Community Woodland

#### Orton Community Woodland

Rob and Maggie Willan saved a piece of land in their local village from grazing, turning it into a community woodland. Harnessing the goodwill and elbow grease of the local community and volunteers, they planted thousands of trees, developed woodland trails and now run educational visits on the site.

Orton Community Woodland applied to Nurture Lakeland for financial support through their Visitor Giving scheme. The charity found two local businesses, one of which has ancestral ties to the village, who were keen to raise money through their guests. The project now has a sustainable future and the community and businesses have strengthened their relationship and improved their understanding of each other's shared aims and ethos.

*"The money we've received through Nurture Lakeland's business members has helped plant a willow windbreak on our site and has led to other communities following our example. If what we have done here encourages one farmer to plant just one tree on his land to increase wildlife and biodiversity, I'll be happy."*

Rob Willan, whose inspiration the project was...

### Marketing Visitor Giving

Visitor Giving creates numerous marketing opportunities for destinations and participating businesses. The Futerra guide, Sell the Sizzle and VisitEngland's Keep It Real guide demonstrate the great opportunities for selling sustainability in a lively, fun and not over preacherly way. If tourism businesses in the destination are raising money for a good cause, people would love to hear about it.



Three Fishes cheque presentation to the Forest of Bowland Tourism Environment Fund

### Great PR stories

A Visitor Giving scheme provides a great opportunity for some positive publicity and marketing. It's a chance for a destination to really shout about how they are supporting local community and environment as well as supporting businesses and giving visitors a quality experience. Destinations can use it as a chance to 'tell a story' and raise awareness about the local environment with their visitors.

Ultimately both the Destination Organisation (DO) and business are offering the customer a more rewarding visitor experience and a deeper engagement with the destination. And for businesses this can often be the first step on the road to a new way of thinking and operating sustainably.

### Marketing collateral

Many Destination Organisations have chosen to facilitate Visitor Giving schemes by making available a range of materials to help participating businesses to communicate their commitment to Visitor Giving. This suite of materials might include various elements or a suite of marketing materials and support to include;

- Posters and postcards detailing Visitor Giving for display in public places.
- Generic room browser information.
- Issuing or distributing press releases when a fundraising milestone is met.

Nurture Lakeland has available for use on licence a suite of Visitor Giving marketing materials, including; logo, web banner, posters and postcard. For more information contact: [info@nurturelakeland.org](mailto:info@nurturelakeland.org)

### Social media

In addition to being displayed on marketing materials, the promotion of Visitor Giving via social media is highly beneficial. Social media is the perfect platform to promote Visitor Giving because its transparency and authenticity neatly complement the characteristics of Visitor Giving.

Twitter is a fantastic platform through which to publicly thank participating businesses. Often twitter interactions lead to additional businesses participation and new followers for the highlighted business. Facebook can be utilised to share pictures of the projects being supported by the Visitor Giving Scheme and to share news articles generated via PR support. Blogs can highlight the quirky and creative fundraising efforts of businesses and track the difference Visitor Giving contributions have made to local conservation.



The launch of 'Nurture Ale'

Visitor Giving creates numerous stories and other Visitor Giving facilitators will find it easy to promote these 'good news' stories via social media. Much of this media activity is likely to be undertaken by the businesses and projects themselves but a Destination Organisation (DO) can support this activity by utilising their own social media channels, tweeting and retweeting and posting updates and good news stories on fundraising in the destination.



### Key principles

Destination Organisations can support the marketing activities of Visitor Giving by promoting a few key principles to business networks.

#### *Encourage businesses to 'care'*

98% of visitors when asked to donate take the opportunity to so.

This figure gives participating businesses the confidence to ask for a donation and access the goodwill of visitors. Encourage participating businesses to communicate directly to this evident characteristic. For example 'we know you care about the beautiful landscapes you love to visit, we do too and that's why we take part in Visitor Giving'.

#### *Promote the 'Good News' stories*

Visitor Giving is hugely popular within the marketing department of participating businesses due to the amount of stories it generates. Visitor Giving offers the opportunity for more than a one off corporate donation and so businesses can promote Visitor Giving at every point of the visitor journey. For example some businesses include project updates in blogs, link to promotions or even use it to theme Christmas cards!

#### *Celebrate the ambassadors*

All businesses want to be seen to be doing the right thing for their local environment and community.

Visitor Giving is an excellent mechanism for demonstrating neighbourly credentials via the care and support of community and the enhancement of the local environment.

One successful business in The Lake District has achieved Visitor Giving fundraising totals in excess of £200,000 by involving and enthusing their staff. Destination Organisations can support Visitor Giving by promoting their local ambassadors and advocates for Visitor Giving.

### *Create additional visitor benefit*

One of the core benefits of Visitor Giving is the way it makes visitors feel. It's a feel good product and presented effectively it will make the visitor feel better about themselves, their booking and the destination in general.

Visitor Giving shouldn't be about creating doom, gloom and guilt messages. Visitor Giving must focus on enhancement and positive contributions.

A Visitor Giving donation can create fun and participative visitor experiences. By highlighting supported projects, itineraries can be created for visitors to experience the important work that their donations are supporting. For example, Nurture Lakeland members who support Osprey protection often recommend a day out to the Osprey Project in Bassenthwaite.

*"All businesses benefit from the natural environment, either directly or indirectly. It is to everyone's benefit that we preserve it."*

Ian Stephens, CEO, Cumbria Tourism.



### Effective use of technologies for Visitor Giving

New technologies to facilitate the process of asking for, handling and managing charitable donations are emerging daily. At the same time the technologies being employed by tourism businesses are becoming ever more diverse and complex, and you only have to take a look at the huge range of different ways that the visitor can book a hotel room to see this.



A Destination Organisation (DO) can support the organisations operating Visitor Giving by sign posting the businesses involved to opportunities and by promoting the giving options to the visitors on their own destination websites.

For adding a Visitor Giving donation to a bill, still by far the simplest way to do this, is to add the request on to the bookings site or ecommerce on pages on the business's website. There is very little time and

Most commercial off-the-shelf software for hotel bookings allows for a range of optional extras to be added to the guest's booking. This facility, often known as 'booking extras' can be used as the mechanism by which to add a donation offer to the guest's bill. Normally this invitation to donate will include a line of information and a hyperlink to the project being supported.

In this way Destination Organisations can show the customer that they are caring for their communities and landscapes and that they are encouraging others in their networks to do so too.

cost involved in doing this and once set up will run smoothly, inviting each visitor making a booking to make a donation, for as long as that website is functioning. Where Destination Organisations are operating their own bespoke tourism listings and bookings facility, then it may be a simple matter to create an additional function whereby participating businesses can add a donation option to each individual booking.

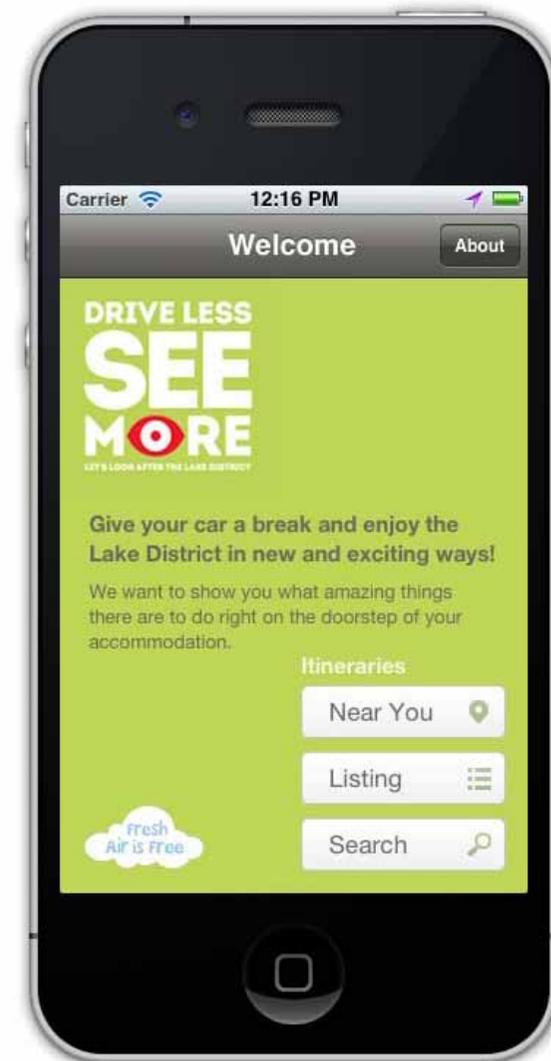
Research shows that more than 50% of people in the UK now own a Smart phone, and that around 19% of travel and tourism searches are made from mobile devices.

Many tourism businesses are hurrying to develop apps in order to be ready to take some of this traffic. Mobile 'apps', can provide a fantastic opportunity to provide the visitor with information about the local environment which they are planning to visit, and at the same time ask them to put a little something back via a small donation. For the organisations administering Visitor Giving, showcasing the projects being supported via an 'app' is a golden opportunity, and for a Destination Organisation (DO) or businesses owning or developing the app, this is a chance to show the customers that they care about their local environment.

An app in isolation is not a marketing solution or a guaranteed way to generate awareness/funds. Apps are potentially part of the suite of activities a business or destination will undertake - visitors still need to be aware of apps to download and use them. In some cases the promotion of the app can be more costly than the development of it. Optimizing your website for mobile technology should be the first step.

For those businesses not yet developing mobile apps, there are still many low cost technologies available to enable Visitor Giving to be embedded into existing technology.

For instance, 'Just Giving' in partnership with Vodafone have developed 'JustTextGiving' and this provides a simple means to allow visitors and others to donate via their phone with a simple short code text. Destination Organisations can support businesses to implement these simple measures by working with organisations operating Visitor Giving to develop simple support mechanisms and resources such as 'how to' helpsheets.



Mobile application developed for Nurture Eden Project

## The Business Model



There is no one size fits all when it comes to deciding on the best business model for operating a Visitor Giving scheme, however there are a number of key questions to answer before setting up the scheme. These include:

- What am I aiming to provide funding for through my Visitor Giving scheme?
- How will it be resourced?
- What is my long term aspiration?
- How are we going to hold ourselves accountable?
- From where will the funding/investment come to get us started?

The answer to these questions will form the basis for any decision about the legal framework to be adopted for the scheme as well as providing the foundations of a robust business plan.

On all operating levels, from finance to governance, it is important to all participants that the scheme has a degree of independence and that any monies raised can be seen to be going directly towards supporting the projects in question. This will mean that the body operating Visitor Giving will act in partnership with, but at arm's length to any statutory body, private business or trade association.

Seeing Visitor Giving from a partnership working point of view and with the old adage of 'the whole is always greater than the sum of its parts', then it is important to have some mechanism for the major players and contributors to come together to shape and govern the project. This may be by way of establishing a Steering or Advisory Group or a case of ensuring that the Board of Directors or Trustees are drawn from the range of stakeholders involved in and affected by the scheme.



Staff, partners and trustees at Nurture Lakeland

## The legal options

Community Interest Company, Registered Charity, Company Limited by Guarantee; there are numerous legal frameworks for operating a Visitor Giving Scheme and across England Visitor Giving is being managed by all manner of organisations, from National Parks to local tourist boards, from 'not for profits' to limited companies and from local groups to national bodies.



The most basic framework for a 'not for profit' enterprise is undoubtedly a simple 'un-constituted group', just like the hundreds and thousands of local action groups doing good work around the country. However, this structure provides no legal protection for anyone involved in running Visitor Giving and provides no framework whatsoever for accountability and governance.

A more common framework for Visitor Giving is that of a 'constituted group'. Usually the constitution takes the form of the agreement of a Memorandum and Articles of Association which provides a set of rules by which the organisation governs itself. This structure is limited however and does not go so far as to offer the organisation legal status or the individuals concerned any legal protection.

The next step on from this is to have the memorandum enshrined in law through the registration of a Company Limited by Guarantee. This is a very simple process, can be done online in less than 24 hours at little cost, and provides the Directors of the Company ie those responsible for the scheme, with some legal protection. This is a legal framework used by a large number of 'not for profits', particularly those who are handling larger amounts of money and public donations.

For many mature 'not for profits' the next evolution is to register the company with the Charities Commission and obtain charitable status. This provides the organisations with many benefits,

including eligibility for a range of charitable grants, larger donations and corporate sponsorship. It doesn't however exempt the charity from any legal or financial obligations.

Obtaining charitable registration can take some time as the Charities Commission will want to be satisfied that all of the activities of the company are being delivered for 'Public Benefit'. For both Companies House and the Charities Commission, annual reporting is obligatory. Further advice on charity registration and 'public benefit' can be found on the Charities Commission website or by calling their helpline.

[www.charity-commission.gov.uk](http://www.charity-commission.gov.uk)

A final option, which some schemes have opted for, is for Visitor Giving to be subsumed into the work of an existing 'not for profit's' or registered charity as a stand-alone project. When this is the case, there is little start-up cost or time, and operational costs can be shared across the whole organisation. What the Visitor Giving scheme could lose though with this option is 'independence' and some kind of formal memorandum to protect that independence will need to be drawn up and agreed by all parties.

**Any organisation considering setting up Visitor Giving should seek advice on the appropriate framework. Legal advice would also be advisable when considering setting up a limited company.**

## Start up and funding

There is no doubt that staff are a costly investment for any new company, but without them planned growth is challenging. Just as tourism is in part about 'selling' the view, Visitor Giving is also about selling the long term care and preservation of that view and contributing to a long term vision for a sustainable tourism industry and to make this happen this will inevitably require some early investment.

The obvious question to ask is, 'how will all of this good work be funded?' There are a number of options worth considering, from basic low cost organic growth, to funded investment in staff with planned growth, through to the option of outsourcing all of the operations to a third party.

This investment might come from:

- In-kind time (from staff in partner organisations).
- The provision of low or zero cost premises by partners.
- Marketing support from tourism associations, Destination Organisations and other partners.
- Seed funding from grants (business and other).
- Volunteer support.

### Tax, VAT & financial matters

Any monies donated by the public, of course have to be accounted for in a clear and transparent manner and to this end some simple processes can be applied on both the part of the business and by the organisation operating the Visitor Giving.



On the part of the organisation operating the Visitor Giving Scheme, it is best to agree in advance with each business when the best time to forward donations will be, and at what intervals. For instance, larger businesses may wish to tally up any donations each financial quarter or at each month end but for smaller businesses, forwarding donations at the end of each financial year might be less onerous. Administration can be kept to a minimum on both sides by enabling participating

businesses to pay their donations into the Visitor Giving organisation's bank account directly. Tourism businesses operating Visitor Giving need to clearly tell customers that anything they give is a voluntary donation and not a charge, making sure that the customers know that they can always choose not to make a donation by letting staff know at the point of payment or by 'opting out' of the ticked box on the bookings form. To keep this simple and quick for participating businesses, be that quarterly, half-



yearly or annually, each business will need to keep a tally of the total donations received from their customers. Once a business has collected in the customers donations, they will need to assign this income to a code for charitable donations in the accounts. Most 'off the shelf' accounts packages will have this built in, or if it's a simple spread sheet which is being used to keep track of the accounts then it is just a matter of adding a 'donations' column.

In all cases businesses will need to add up the donations for the year and let the accountants know the total as any charitable donations can be used to offset income or corporation tax.

Once the year's donations have all been gathered up from the supporting businesses, then a cheque is sent (less the operating costs) to the project/s being supporting, helping them to continue their vital work.

It is worth noting that if the business is operated as 'a sole trader' then the donation can be 'Gift Aided'.



Gift Aid provides a valuable additional source of revenue for charities and where possible if businesses have some means whereby customers can agree to or sign a Gift Aid declaration then the charity or organisation operating Visitor Giving locally can draw down the extra 25% from the government, turning every £1 into £1.25.

As charitable donations are not vatable items, you should not have to charge or pay VAT on this amount of money. To make this clear in the transaction, businesses will need to add the donation in as a 'bookings extra' at the end of the bill. In this way it will not be added to the vatable total. You can find more information about VAT and charitable donations at:

[hmrc.gov.uk/businesses/giving/companies.htm](https://hmrc.gov.uk/businesses/giving/companies.htm)

### The cost of operating Visitor Giving

Like any small enterprise, there are inevitable costs involved in managing the Visitor Giving process. Whether the scheme is hosted by a larger parent organisation or run locally by a small business cluster, there are some basic costs which will need to be covered, and in terms of the long term chances of success for any Visitor Giving scheme, these costs will need to be realistically assessed.

For instance, questions such as:

*'Does the scheme need full time professional staff or can it in part be staffed by volunteers or in kind time contributions of key partners?'*

*'How is the scheme to be marketed to potential business participants?; As well as 'who will deliver the administrative functions required, such as accounting and finance?'*

Any viable enterprise needs to be able to meet these costs in some way and in the case of a Visitor Giving scheme some of the donations will usually need to be retained to meet these overheads.

Typically operating costs will be a fairly minimal at around 20%, but this will in the end depend on the answers to the questions posed above.

Naturally donors will want to see as much as possible of their donations going to support the projects of choice, and it is important to be honest about the cost of fundraising whilst at the same time striving to keep these costs down.

**The information given here is accurate at the time of going to print, but it is advisable to seek advice from HMRC or a financial professional.**

### Transparency and accountability

The ultimate aim of any Visitor Giving Scheme is at the end of the day to give away money; money which can help to pay for local projects to benefit local communities, heritage, landscape and environment. One of the most important aspects of setting up a Visitor Giving scheme is deciding which projects are going to be the beneficiaries of this fundraising.



The process of giving the money away can often be harder than raising it!

Whether the Visitor Giving scheme is administered by a Community Interest Company, registered Charity, Company Limited by guarantee or any of the numerous other organisations by which Visitor Giving can be managed (see The Business Model) it is essential that the organisation operating it has a robust and transparent process in place

for selecting the beneficiaries of the visitors' donations and for reporting on the impact of the investment.

Ensuring that the grant-making process is equitable and transparent at the outset will give a greater degree of accountability. This will reassure partners and other organisations operating in the destination that your methods are fair and open to public scrutiny.

### Criteria

Before seeking projects to support or inviting applications for funding, establish a set of criteria against which all applications may be judged equally. Some points to consider:

- Decide not only what will be funded but what you won't. For example, you will fund practical conservation projects but you won't fund renewable energy projects.
- Decide from what type of organisations, applications for funding will be accepted. For example, you will accept application from charities, community groups, any constituted group with a bank account, but not from businesses or individuals.
- Decide what other criteria is required to meet your objectives. For example, all projects must have public benefit, or all projects must demonstrate benefits to the wider community.
- Once criteria has been established, make this a publicly available document.
- It is also useful to have a set of internal guidelines to which can be referred to when, all other things being equal, you need to make decision about two equally viable and worthwhile project submissions. This may include prioritising less advantaged areas in your destination or filling a gap in your project portfolio where a particular theme is not yet represented.

## Application form

Your grant-making criteria will inform the development of the funding application form which any project seeking funding from Visitor Giving will need to complete. This should request information about the project allowing you to mark it against your criteria as well as providing additional information.

Questions which should be considered include:

- Applicant organisation details.
- Length and location of project.
- Overall project cost and amount being applied for.
- Other funders and amounts - secured or not.
- Sustainability of project - how will it continue after your funding has finished?
- Project overview, purpose and specific outcomes.
- Who will the project involve and who will it benefit?
- How will the project have a positive impact on your objectives and/or destination management plan.

Ideally the application form should be made publicly available together with your criteria and guidelines for completion.

## Grants Panel

In order for the decision-making process to be seen to be equitable, it is advisable to establish a panel of representatives who will meet to discuss and deliberate the submitted project applications against the prescribed criteria.

The Grants Panel is usually made up of the destination's Visitor Giving Scheme Manager, Trustees from the scheme's managing body and at least one external representative. The Panel members should represent a cross-section of organisations ideally from the private, public and third sectors and have some expertise in the objectives of your funding body.

Of course it must be recognised that, with embryo Visitor Giving schemes, it is often easier and more appropriate to seek a couple of suitable projects to be recipients of the fundraising during the early or pilot stages.

Some destinations choose to raise money for a central 'pot' or fund whilst donations are relatively small. However, the establishment of the Grants Panel and application process should form part of the scheme's initiation process so that the correct procedures are in place as the scheme grows and develops. There is more information on the grant making process on the Directory of Social Change website: [www.dsc.org.uk](http://www.dsc.org.uk)

## Resources and support

### Links, references

**Nurture Lakeland** - [www.nurturelakeland.org/](http://www.nurturelakeland.org/)  
Nurture Lakeland specialises in Visitor Giving schemes.

**Council for National Parks** - [www.cnp.org.uk](http://www.cnp.org.uk)  
Dedicated to campaigning to protect and promote all of the National Parks of England and Wales.

**The Visitor Giving Network** - [www.nurture-tourism.co.uk](http://www.nurture-tourism.co.uk)  
Join the Visitor Giving Network for support on setting up and running your own Visitor Giving scheme and to access free and low cost training and resources.

**VisitEngland** - [www.visitengland.org](http://www.visitengland.org)  
The official body responsible for promoting England as the destination of choice.

**Charitable donations tax and VAT** - [hmrc.gov.uk/businesses/giving/companies.htm](http://hmrc.gov.uk/businesses/giving/companies.htm)  
A guide explaining how companies can claim tax relief when donating money to charity.

**Gift Aid** - [www.hmrc.gov.uk/individuals/giving/gift-aid.htm](http://www.hmrc.gov.uk/individuals/giving/gift-aid.htm)  
Gift Aid increases the value of donations to charities by allowing them to reclaim basic rate tax on gifts.  
**Charities Aid Foundation** - [www.cafonline.org](http://www.cafonline.org)  
CAF provides information on how to give effectively

as a company and also provides a number of useful tools for managing charity donations.

**Just Giving & Just Text Giving** - [www.justgiving.com](http://www.justgiving.com)  
JustGiving is the world's leading platform for charity giving and provides a number of useful tools for managing donations by text and online.

**Charity Commission** - [www.charity-commission.gov.uk](http://www.charity-commission.gov.uk)  
The regulator for charities in England and Wales.

**Directory of Social Change** - [www.dsc.org.uk](http://www.dsc.org.uk)  
An independent charity with a vision of an independent voluntary sector at the heart of social change.

**Keep it Real** - [www.visitengland.org/keepitreal](http://www.visitengland.org/keepitreal)  
A new toolkit to help tourism businesses to sell sustainability as part of their unique offer.

### FAQ's

#### Why is it different from other types of fundraising?

Visitor Giving works on the principle that a lot of small contributions, together, add up to something really quite significant! The scheme is specifically designed to work in the tourism industry and this is a sector that is not always well understood by the conservation sector (and vice versa!) Visitor Giving provides a unique method of showing that tourism

and conservation can be mutually supportive, working in partnership for a sustainable future.

#### Is it going to take away donations from other projects or organisations?

Visitor Giving seeks donations specifically from the tourism sector and the aim is not just to raise money from visitor donations but also to use the opportunity to educate and raise awareness about wider conservation and environmental issues. Our experience indicates that the givers will continue to be just as generous to other projects in which they have an interest. With such small contributions being suggested (just £1-£2) donors don't have to make any big 'either/or' decisions.

#### Will people really give money to it?

Customer research in the Lake District shows that 97% of customers are happy to make a donation. Accommodation businesses operating opt-out donations have a 95% take up (100% online!) by guests.

#### How do I get started?

Contact Nurture Lakeland. Pick up the phone and give us a call on 01539 822622 or log on and drop us an email to [info@nurturelakeland](mailto:info@nurturelakeland).

### Case studies

#### Nurture Lakeland, Cumbria



#### About the scheme

The Visitor Giving scheme in operation today in Cumbria started life 18 years ago as the Tourism & Conservation Partnership. In 1994 a handful of local tourism businesses, backed by the Lake District National Park, Cumbria Tourism and the National Trust, started to generate donations from visitors. This led to the funding of a conservation worker to fix upland footpaths, known as 'Our Man at the Top.' The idea quickly grew to include many more businesses and 18 years on, is now the most successful Visitor Giving scheme in the UK, having raised over £2 million for conservation. The overall objective of the scheme is to protect the natural environment in Cumbria, funding projects to protect wildlife, conserve landscape, improve access and support local communities across the Lake District.

The scheme is managed and administered by Nurture Lakeland, a registered charity which exists to protect and enhance the environment. Nurture Lakeland is a membership organisation with just over 370 business members bringing in approximately 30% of the charity's revenue. Visitor Giving is offered alongside a variety of other services and advice promoting the values of sustainable tourism.

Cumbria Tourism and other local Destination Organisations (DO) support the scheme through promotion and in-kind support and advice.

#### Fundraising

There are a number of methods in action that bring in around £200,000 annually through Visitor Giving. Nurture Lakeland works closely with each business to personally create a method that matches the ethos, brand and image of the business.

For accommodation providers: the most successful and popular method of Visitor Giving is 'Opt-In'. Guests are invited to make a voluntary contribution (usually £1 or £2) which is added to their bill either at the point of booking or to their final invoice. Participation rates are high, with an average 95% of people making the donation. Once set up, Opt In is low maintenance, involving very little administration for everyone concerned. For visitor attractions and event organisers: the usual means of securing a donation is via a ticket or entry fee 'levy'.

For retailers, restaurants and cafes: here 'sponsored product' fundraising is used to secure a donation. The activities of Nurture Lakeland are partly supported by a membership scheme with participating businesses paying upwards of £50 per annum to join. This revenue provides almost 25% of the income of the scheme and has been vital in ensuring its long term sustainability.

Funds are collected twice a year and thank you certificates are sent out to every fundraising business. Nurture Lakeland incurs an administration fee on all fundraised monies to subsidise the cost of fundraising. This fee is currently 20%.

Nurture Lakeland provides a comprehensive range of marketing materials to help businesses communicate Visitor Giving to their customers.

Support is provided for businesses to encourage the wider publicity of the scheme too, celebrating fundraising achievements through local press and radio, extensive use of social media and via a network of partner organisations and members.

The name 'Visit Give Protect' has recently been adopted as the brand for the Visitor Giving scheme, taking a direct approach of a strong call to action to the visitor and enhancing the contemporary look and feel of the scheme. This has been warmly received by participating businesses.

## Beneficiaries

Projects benefiting from funding generated by Nurture Lakeland's Visitor Giving Scheme must be able to demonstrate a clear and positive benefit to the environment, culture and communities of Cumbria, for example by conserving biodiversity, taking measures to tackle climate change, educating communities, raising awareness or carrying out countryside maintenance. The projects should normally be accessible to members of the public, and where possible involve and benefit local communities. Nurture Lakeland requires that the beneficiary agrees to become a Member and pay an annual subscription fee. In this way the beneficiary is also working to ensure the longevity of Nurture Lakeland and facilitating its work in growing business sponsorship for projects. The amount of money available is always dependent on the amount of fundraising businesses have been able to undertake each year.

There are two different types of funding available through Nurture Lakeland's Visitor Giving Scheme:

- Small Grants – up to £1,000 for smaller projects.
- Business sponsorship – large/long term projects.

Some large scale projects receive business support of tens of thousands of pounds each year. The majority of business sponsors fundraise a maximum of a few thousand pounds per year for their chosen project.

Once a year Nurture Lakeland sends out monitoring forms to be completed by the beneficiary for each project supported and it is a condition of on-going support that this monitoring form is completed.

Support is open to charitable organisations such as village halls, community groups, parish councils, social enterprises and conservation agencies. Organisations must agree to abide by Nurture Lakeland's Fundraising Agreement or Small Grants Acceptance Agreement.

## Successes

Reaching £2 million in 2012 was a huge success for the Cumbrian scheme. Entering the challenge events market has produced great results also, with £7,500 raised from the Lakeland 100 event in 2012. Fix the Fells is one of the most successful and well known projects funded by Visitor Giving, with around £80,000 a year going into the partnership with the National Trust and Lake District National Park Authority to repair upland footpaths.

Nurture Lakeland have been very successful in working in partnership to draw down match funding, this can contribute as much as a further 30% on top of fundraising through matches with private businesses, funders such as the heritage Lottery Fund, the Big Give and Gift Aid.

## Challenges

Continuing to grow a scheme whilst also continuing to provide an excellent service to existing members is an ongoing challenge, with considerable resources going into retaining and engaging businesses. Nurture Lakeland are exploring other models for the implementation of Visitor Giving that will allow greater flexibility than the current centralised administration of the scheme. This will involve a number of new initiatives including, setting up local cluster groups supported centrally, making better use of mobile 'apps' and text giving, and creating local volunteer groups to help promote the scheme.

Technology can be both a success and challenge. Whilst much progress has been made in harnessing new technologies to facilitate Visitor Giving it is challenging to stay ahead of new developments and ensure that fundraising businesses have the opportunity to access the most efficient and cost effective fundraising mechanisms.

## Future development

Nurture Lakeland's aspirations to continue growing the Visitor Giving scheme will hinge around further engagement of the tourism sector in Cumbria. At present around 5% of the sector has been reached by the charity, which is aiming to penetrate 30% as a long term goal.

## Case studies

### Love the Broads, The Norfolk and Suffolk Broads



## About the scheme

'Love the Broads' was set up and implemented by the Broads Authority with the support of Nurture Lakeland. Funding for its development and implementation was provided by the EU from the STEP Interreg Programme. It was imperative for the scheme that the money raised was not seen to be going to any kind of 'Authority' and for this reason the scheme is now managed and administered by The Broads Trust, a completely independent registered charity.

Incorporated as a Registered Charity in 2008 the Broads Trust has been established as an enabling body which aims to promote Broads based entities by providing fundraising support for improvements to benefit the people who live in, work in and visit this unique wetland area.

The Trust acts as a fundraising charity working with other Broads related charities and interested bodies in order to stimulate and support sustainable and high quality projects which do not otherwise fall into the statutory purposes of any authority, providing there is a clear public and community benefit.

It was decided at the outset that a small pilot Visitor Giving project should be run in the first season, as a learning exercise before attempting to operate the scheme on a larger scale. Businesses were approached initially through Broads Tourism and all those who were asked to participate agreed with enthusiasm. The pilot businesses were: Broadland Cycle Hire, Ferry Marina, The Dairy Barns, Norfolk Broads Direct, Wroxham Barns, Clippesby Holidays and Bank Boats.

## Fundraising

The first season of the Visitor Giving pilot raised just under £4,000 in around 6 months. Each pilot business adapted Visitor Giving to suit their situation and there was an interesting mix of fundraising methods used. Two large accommodation providers implemented opt-in on their bookings systems which proved to be very effective. Tourism attractions such as a cycle hire business and canoe hire added a donation onto the cost of their hire prices. Another business chose to add a donation onto each sale of a walking guide for the area.

Each business was supported with marketing materials to communicate to the customer the aims of the scheme and raise awareness of the importance of conservation of the Broadland landscape. The Broads Authority supported the marketing of the scheme through various press releases during the season.

The STEP Interreg Programme was able to fund a further strand of income generation through the production of pin badges, which are offered in attractive display/donation boxes. These can be made available to other outlets as well as the participating businesses, and they are already performing well in raising money.

## Beneficiaries

The Broads Trust agreed a shortlist of criteria by which to fund beneficiary projects and used existing grant-giving procedures, such as an established application process to work towards the distribution of the funding amongst local projects. The pilot scheme identified 7 potential projects for funding, to be delivered by local conservation organisations. The collection of the first round of funds has now been completed and The Trust is entering the process of evaluating applications for funding. It is planned that a grants panel will be established to affect this process rather than the board of trustees themselves.

Key elements chosen to be funded by Visitor Giving in the Broads are:

- Improvement of access and visitor interpretation.
- Caring for our rich biodiversity.
- Provision conservation education for the next generation.

## Successes

The success of the pilot scheme has been very promising, not only in terms of money raised. All of the pilot businesses are keen to carry on fundraising in the second year and development work is underway to ensure that they are operating the scheme as efficiently as possible. The positivity and enthusiasm of the pilot businesses is now being harnessed to recruit new businesses to the scheme for the 2014 season.

Publicity and marketing has also been a great strength of the scheme, support for the Broads Authority and STEP funding enabled 'Love the Broads' to create some fantastic materials from web banners and postcards to pin badges and posters, using the Enjoy Give Protect logo.

## Challenges

A key challenge for the Broads Trust will be reaching the goal of economic sustainability. The seed funding provided by STEP is now finished, and the Trust is currently seeking other sources of support in this early period of work to subsidise administration costs and fund the development of the scheme to enable growth in the first 3 years.

The Broads Trust has also faced challenges in effecting the process of distributing the funds raised by Visitor Giving. The time needed to establish a grants panel is directly juxtaposed to the need to distribute the funds and the importance of generating positive PR from local projects, in order to continue recruiting new businesses to the scheme.

## Future development

In the immediate future the aspiration is to recruit further businesses to the scheme for 2014 and work towards achieving an annual fundraising target of £20,000. A development officer has been recruited on a part time basis to undertake this work with the local businesses.

## Case studies

### CoaST One Planet Tourism Ambassadors



Businesses operating Visitor Giving who are members of CoaST have the option to become 'Ambassadors'. CoaST Ambassadors are a variety of businesses with different objectives, at different stages of development, with different budgets, approaches and locations. However, they all have one thing in common, an 'understanding of how sustainable practice means higher quality, improved efficiency and happier visitors.'

## Fundraising

There are many methods employed by the participating businesses, the most common is opt-out or opt-in, particularly with accommodation providers, giving visitors the option to add a voluntary donation of £1-£5 onto their bill at the end of the stay. Other types of business taking part in the initiative include food and drink establishments, retail, visitor attractions and tour operators. Here are some examples of Visitor Giving in action:

### The Primrose Valley Hotel

The Visitor Gifting scheme was launched on 24th March 2005, whereby a voluntary donation of £1 per room per night goes directly to the Marine Conservation Society (MCS). MCS is the UK charity dedicated to protecting our seas and the life within them and helps maintain Porthminster Beach, the blue flag beach next to the hotel. In 2006 Primrose Valley Hotel started a second Visitor Giving scheme, partnering with the Cornwall Wildlife Trust to

produce jute bags that carry the MCS, CWT and hotel logo. 50% from all bags sold goes directly to the CWT. Primrose Valley Hotel currently supports Trelya, a charity providing positive interventions into the lives of the hardest to reach children and young people in West Cornwall. Primrose Valley Hotel supports the charity using its visitor gifting scheme, raising approx. £2,500 a year, and providing work placements for the people it works with, in the hotel.

### The Venus Company



This café raised over £30,000 for the South Hampshire 'On the Right Tracks' programme which aimed to help conserve the area's historic green lanes - having expanded into Cornwall owner Mike Smith, was keen to set a similar scheme in place. Unable to find a centrally managed scheme to support, Venus set up a partnership with the Cornwall Wildlife Trust through the Venus Beach Wildlife Fund, aiming to raise awareness and help practical conservation of the flora and fauna that inhabit Tolcarne Beach at Newquay. The Venus Beach Wildlife Fund, allows customers to support the Venus ethos of 'Loving the Beach'; for the next 5 years, the cafe will donate 5p on their customers' behalf for every cup of tea and flake bought.

### Bedruthan Steps Hotel

In 2006, Bedruthan put in place their 'Guest Gifting' scheme aiming to neutralise their carbon dioxide emissions by helping visitors to offset the CO2 emitted by travelling to the hotel. The scheme encourages visitors to think about their impact on the local and global environment. A voluntary donation of £5 pound per room stay goes onto the bill – visitors can opt out of this scheme if they so choose; for each £5 that is donated a tree is planted that will be allowed to grow for 100 years, feeding oxygen back into the atmosphere and supporting insects and other creatures, managed by offset company Co2balanced. Guests receive a certificate printed on 100% recycled paper using renewable electricity to thank them for their donation.

### Feedback from participants

Higher Menadew Farm Cottages Andrew Higman:

"We have run a VG scheme to collect monies for the Cornwall Wildlife Trust for several years. It's a simple opt out scheme where £2 can be donated when making a booking. Each year the funds pay for the Cornwall Wildlife Trust to run a session at a local Primary School where children, hopefully, get a better understanding of wildlife and appreciate and respect it more. The remaining funds go towards important and specific projects for which the Trust is raising money. We've raised over a thousand pounds so far for the Wildlife Trust. The VG scheme is easy to run and benefits a worthwhile cause; so it's hard to understand why more businesses don't run a Visitor Gifting scheme."

King Harry Steam Ferry Co Ltd, Tim Light, Director:

"We do not charge pedestrians or bikes and instead for visitor gifting and put the donations towards local projects/charities – last year Invictus trust, this year Surf Action and our staff fund raise for the same charities."

### Beneficiaries

There is a wide range of organisations benefiting from the tide of Visitor Gifting schemes operating in Cornwall. CoaST has been influential in gathering support for Cornwall Wildlife Trust, partnering with the charity to promote Visitor Gifting to CoaST members and ambassadors. Cornwall Wildlife Trust benefitted from the involvement of over 20 businesses in Visitor Gifting schemes last year (2012). Collectively they contributed nearly £10k that year towards Cornwall Wildlife Trust's nature conservation work. As illustrated in the above examples, businesses are at liberty to support charitable causes of their choice and in doing so undertake the responsibility of sending any donations directly to the organisation for which they are fundraising. Any marketing materials and project information is provided to the business from the organisation which they are supporting or simply produced by the business themselves.

CoaST is also working with a number of members on a Visitor Gifting Scheme towards the activities of the CoaST Network, 'helping to consolidate its resilience, and invest directly in the vigour and energy of the Network.'

### Future development

Manda Brookman (CoaST Director) says:

"It's a simple, accessible, understandable way for businesses, and visitors, to guarantee a positive impact on the local community, and the local environment. We hear of more and more businesses taking it up – it's becoming a clear indicator of a business with real sustainable practices in operation. As many businesses choose those areas to support which are important to them, the scheme comes with integrity locked in – it's all about the passion!"

### Future challenges

Manda Brookman (CoaST Director) says:

"I think that there will be challenges for all, everywhere; but I also think the visitor gifting can come into its own at a time of austerity, as it does what it does very fairly – it asks of those who partake, a small contribution. Those who enjoy an area are enabled to support it in a very small way – and therefore in a way that is accessible to all who to enjoy it. Furthermore, it shows by doing: by enabling visitors, and businesses, to contribute in a small way to protect and manage what is important to us environmentally, socially and economically, it shows how easy it is for us all to participate in times of austerity, and then how collectively powerful that participation can be."