

## Outline Business Plan August 2023



St Mary Magdalene, Stockland Bristol TA5 2PZ

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## SUMMARY

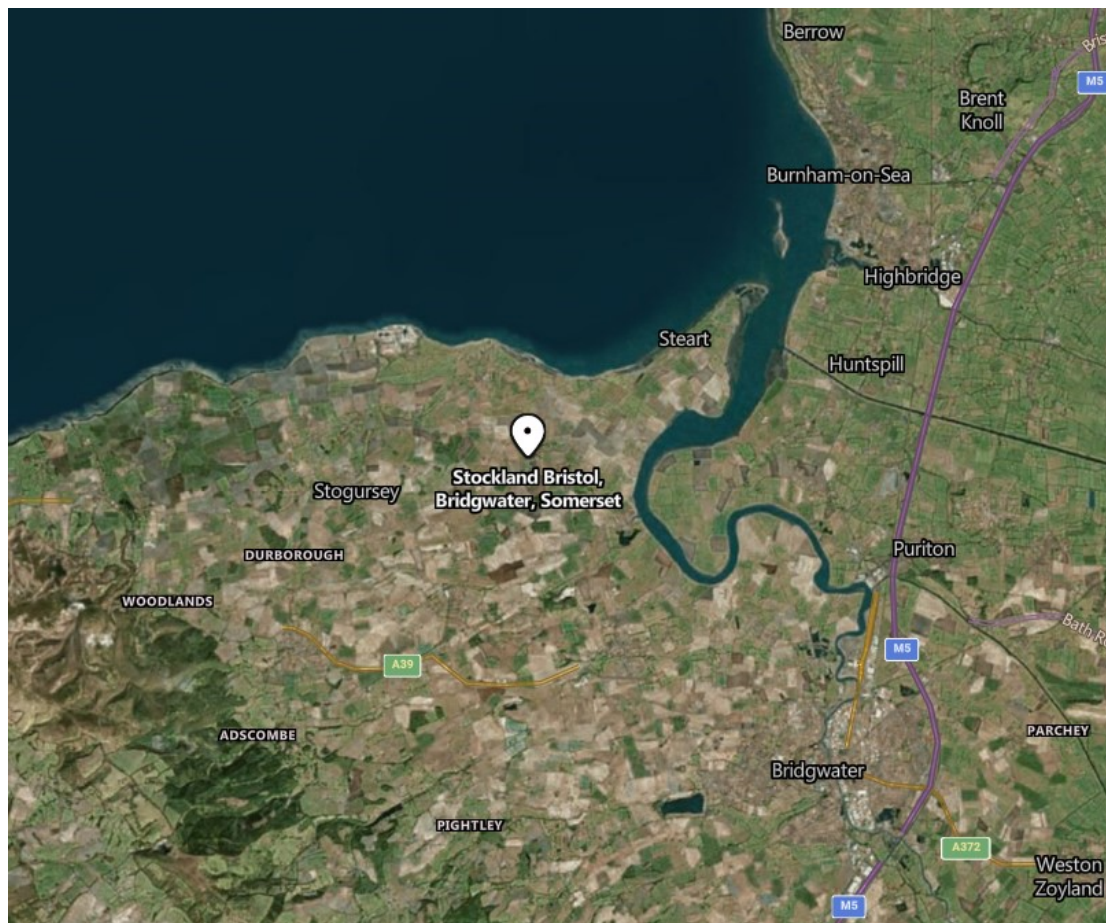
### Our Setting and our Church

Nestling between the Quantock Hills and the Severn Estuary, Stockland Bristol is a small village 7 miles NW of Bridgwater and 1 mile SE of Hinkley Point – the largest construction site in Europe.

Our immediate environment varies massively. Within 100 metres we have the salt and freshwater marshes of the Steart nature reserve, owned by the environment agency and managed by the Wetlands and Wildlife Trust. Other than the birds, the marshes are grazed by rare breeds and our insect (and therefore bat) life is rich. But within a mile we also have a commercial shoot, industrial chicken sheds, an intensive dairy farm and hectares of arable fields with all the related issues of chemical run-off into the rhynes, lack of diversity, soil depletion and lone-working farm employees.

Our views: east over Steart to Burnham and the Mendips, or north to Cardiff, contrast with the cranes of Hinkley to the NW – and the city-bright light pollution coming from the site. We are exactly 1 mile (on public footpaths) from the SW Coastal Path.

With a population of 172 (2021 census and creeping up as barns are converted for domestic use), 27 members of the community are resident in the Old Vicarage Care home, which is the root cause of our population showing an even older than usual proportion of over 65s for rural communities.



In common with many rural communities, our school is long gone, as are our shop and other traditional village resources. Other than a morning bus (only during school terms), there is no public transport within three miles. There has never been a pub in the village, but we benefit from a thriving social club, located in the old school since 1950. Cycling is hindered by the danger represented by the C182 Hinkley Road which (having no footpaths) further makes us utterly car-dependant.

Our main (and growing) issue lies around isolation. As a community we are only accessible from the C182, a minor road, but the only transport route to Hinkley Point. This road is intimidatingly fast and busy for many of our older residents. For individuals, without any publicly accessible space to gather, personal isolation is growing (exacerbated during the pandemic) and on-line shopping, despite our pitiful broadband, is condemning ever more people to solitary lives in their houses and gardens.

Politically, we are to be in the new Parliamentary constituency of Burnham and Bridgwater. We are also in the throes of the new One-Somerset local authority reorganisation and the obliteration of Sedgemoor District Council, which has been our civil authority since 1974. We are developing our role in the (very logical) Local Community Network (LCN) of 'Dowsborough' on the Quantocks. Stockland is too small for a Parish Council and so operates under the Parish Meeting system whereby every member of the community is in-effect a councillor, with an elected chair to run the obligatory annual AGM. Beyond this minimum, the Parish Meeting meets quarterly and chooses to elect a treasurer and an additional officer to ensure good governance and spread the load of allocating (and organising) the precept. This governance model ensures frequent and detailed open discussion of local issues and concerns which, having Hinkley on our doorstep, are more considerable than would be expected of a community of this scale and position.

Beyond the Parish Meeting, the community communicates through a monthly c.40-page A4 parish newsletter 'The Gatepost'. There is also a well-subscribed and lively WhatsApp group which (instigated during COVID and perpetuating) allows us to share matters of concern (loitering vans, email scams, waste issues etc) and the all-to-frequent alerts of traffic chaos in Bridgwater and accidents on the C182 and A39.

### **Our Heritage:**

Identified in the Domesday Book, Stockland had a squire for only 120 years of its existence, being managed as endowment lands for institutions until the 1830s. Bequeathed to the St Mark's (later Gaunt's) Hospital in Bristol by Maurice de Gaunt in the 13<sup>th</sup>-Century, the manor and lands were sold to Bristol Corporation by the crown in 1541 at the Reformation. Stockland records for that period survive mainly as financial considerations in the Bristol Archive. Following the 1834 Bristol Riots, the Great Reform Act and the general political upheaval in the 1830s, Bristol financed its need to create a police force by selling its endowment lands at Portishead, Stockland and elsewhere.

In the dying throes of its existence, Bristol Corporation sold the Stockland holdings to the son of its outgoing major, Bristol Merchant Venturer Thomas Daniel, known as the 'King of Bristol' at the time because he was so omnipotent in Bristol's political and business affairs. He had one of the largest compensation awards of



anyone in the country (£7.1m in 2023 terms<sup>1</sup>). The Daniel family derived the vast majority of their wealth from the slavery economy: as owners of plantations and enslaved people, as owners of ships trading between England the West Indies, as mortgage providers for plantation owners, as sugar merchants, as shareholders in copper and iron companies, and as compensation awardees. Much of this wealth was used to buy estates such as Stockland Bristol and Daniel purchased Stoodleigh in Devon as his new dynastic seat. He also bought first the advowson and later the manor of Stockland, seemingly as a living for his ordained younger son Henry. The development of the estate progressed somewhat sporadically over the next few decades, but Daniel rebuilt the (fairly new) Vicarage in 1860, followed by the church in 1865-7. For the first time Stockland came under a 'manorial' gaze with a personal (rather than institutional) owner and management for purposes beyond maximum income. The detail of the timeline will be explored during the development phase.



<sup>1</sup> [Inflation calculator | Bank of England](#) £71,562 in 1933

The village has narrowly escaped growth and prosperity several times. In the 1790s, a ship canal was proposed (and granted its Act of Parliament) which would have run from the Parrett to Exmouth, passing through the parish. In the 19<sup>th</sup>-Century, Stockland was twice scheduled to be on a Bridgwater to Minehead railway line, before the track was finally built from Taunton, running to the south of the Quantocks. Finally, when invasion was expected to come from the west c1940, the



*Detail of Saxton's 1575 map of Somerset (Wells Cathedral offices)*

and as Godwin & Crisp by contemporary<sup>2</sup> and other sources. The result is a competent Victorian gothic structure, well built, but over-sized for the scale of the

countryside between the village and the estuary was interlaced with military tracks and a formidable line of defences, of which remains survive. Post war, Hinkley Point was identified as a location for nuclear power generation; the third power station is currently under construction, whilst both its predecessors are in the process of being decommissioned.

Woefully under-listed in the mid-1980s, Stockland's designations underplay the quality of our built environment. The Manor is listed Grade 2 as is one other house and one farmhouse. Unlisted buildings of note include the (now-renamed) Manor farm, which was re-fenestrated in the 19<sup>th</sup>-Century, yet still harbours the old roof structures and remnants of thatch within its later tiled roof. There is also a (also unlisted) thatched medieval cottage. In the middle of the village (in a corner of an ancient orchard) there is a stone-built animal pound which was excluded from the 1830's and 1950's manorial sales, so is assumed to be a parish asset from before the reformation.

The current church was rebuilt on the foundation of the medieval building in 1865/7; areas of structural instability only occur where the Victorians changed the footprint and failed to knit the two building phases together. The architect attribution is unclear, being identified as 'Arthur of Plymouth' in the listing

<sup>2</sup> West Somerset Free Press, 15<sup>th</sup> June 1867 – description of dedication service

settlement and correspondingly plain in its decoration. The grade 2 church is currently on the Historic England's 'Buildings at Risk Register' number 1059049. There have been few changes since the rebuilding, most notably the restoration and reintroduction of the medieval screen in c1920 as a (Great War) memorial, the introduction of a barrel organ and the fixing of two boards commemorating both the fallen and the returned of both wars. The faculty papers in the 1940s include a comment from the archdeacon that to include the names of the returned should be considered 'dangerous'.

A small collection of photographs of the old church and some village buildings survive in the vestry and their conservation is included in this application.

In common with myriad parishes, our current ordering is inflexibly modelled to the 19<sup>th</sup>-Century ideals of Eucharistic Christian worship and church use. The serried ranks of catalogue pews, whilst organised for the worship/aesthetic conventions of the time, now hinder our ability to diversify our activities or our audiences. Our seating is implacably dictatorial in limiting the use of the building – the arrangement in the north aisle is perplexing as there are no sightlines to the altar, a few occupants can see the pulpit (but not the preacher) and the pews march steadfastly into a solid wall. Our proposal will remove the pews from this (north) aisle whilst leaving the nave in its original order. The useful seating capacity for worship will be largely un-affected.

To make the building useable, we need also to look at the electrical services, bring in a water supply/drainage to incorporate a modest servery and WC into the building. With sustainability in mind, we are planning to warm the people, rather than heat the building and are investigating a user-pays card-reading 'switch' to activate services and provide heating on demand. We are constructing our project with the environment at the forefront of all our plans and our current proposals (and mitigation for our own activities) are detailed in our application form.

With the loss of the family benefaction in the 1950s and declining congregation numbers we recognise the need to move away from relying on an income model based on giving, towards one of earning money through our activities and low-key business ventures. With congregation numbers above the national average of 2% adult population, our base of regular giving is still too low to maintain both Community Fund (Parish Share) and maintain our assets. Our church already attracts great generosity from the non-church-going community with individual donations and the Parish meeting annually voting a substantial part of the precept for grounds and essential building maintenance. One-off clearance and ivy-bashing appeals are always enthusiastically attended and regular tasks (churchyard maintenance, clock winding and opening the church daily) are all undertaken by people who do not use the church for worship.

It is clear that perpetuating and developing ourselves as a spiritual home for our community is no longer a matter of merely opening our doors for regular worship according to the Book of Common Prayer. We want (and need) to adapt ourselves and our building to offer spiritual solace, albeit now via coffee mornings and support groups and by hosting activities that offer escape from our modern blight of isolation and loneliness.

We have a rich and varied natural heritage. Our small (.02ha) churchyard is surrounded by pasture and arable farmland. 100 metres to the south (by direct public footpath) lies the Stockland Marsh, the freshwater area running into the increasingly saline Steart Marsh, the Wetlands and Wildlife Trust bird reserve. The churchyard has been managed for biodiversity for many years, now more consciously through affiliation with the Wider Churchyard project run jointly by the Diocese of Bath and Wells and Somerset Wildlife Trust. Exactly one mile to the north, again on public footpaths, is the South West Coast Path, the new Somerset



section linking Burnham on Sea and the North Devon coast. Between us and the coast path is a varied landscape of arable, pasture and woodland, gradually turning more coastal as it crosses several generations of sea defences before reaching the Severn Estuary.

Our low population density allied with the preponderance of pasture alongside lands specifically managed for wildlife gives us a healthy insect population with all the associated dragonfly, birdlife and bat populations. Our recent ecology survey has identified several species of bats in and around the building, including the greater horseshoe, as well as many varieties of wildflowers and several grasses possibly unique to this area of Somerset.

A history of the parish was written as a millennium project and distributed to every house in the village. Long out of print, we have acquired a copy to assist the research and interpretation.



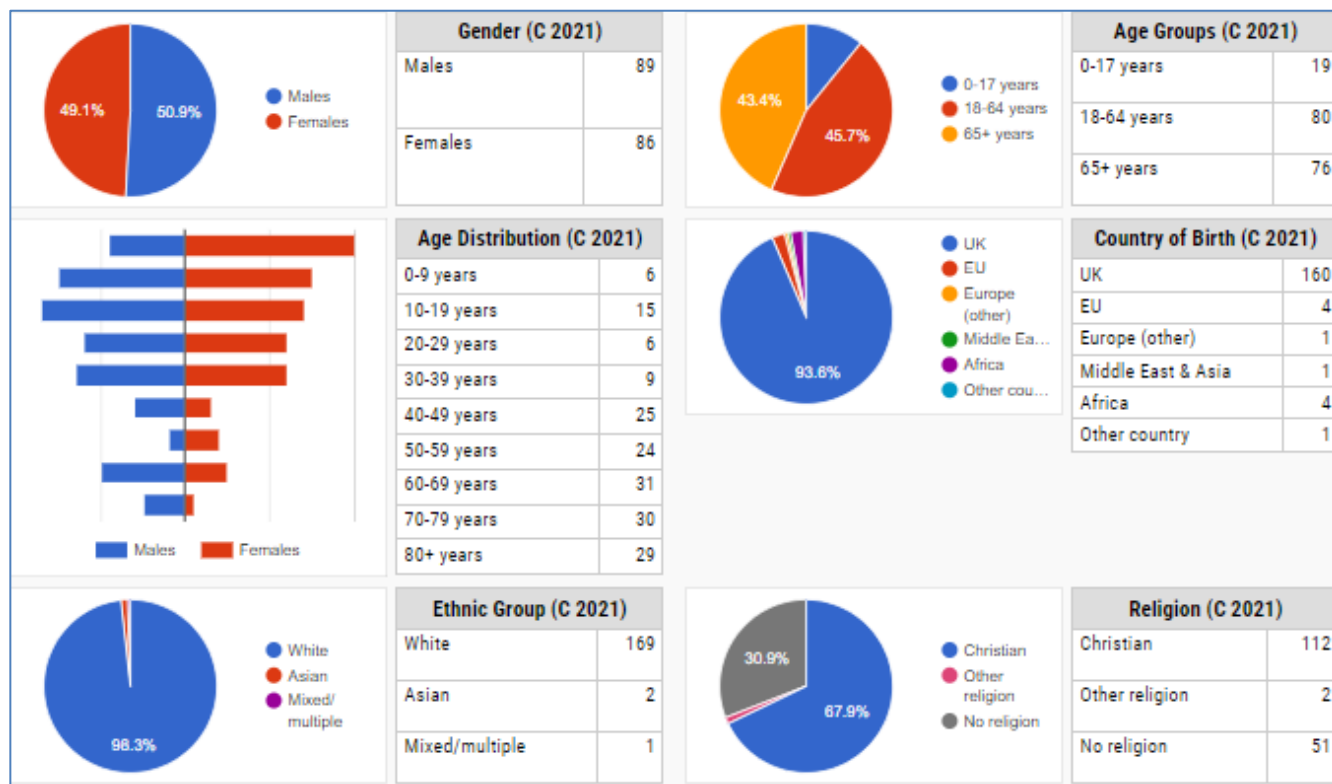
*Towards Steart Reserve and the Parrett*



## Our Project so far:

The project at Stockland began in earnest in 2018 following key observations:

1. The church building is serviceable for worship events, but (particularly the tower) is in urgent need of repair;
2. Stockland is a tiny village<sup>3</sup>, isolated by the Hinkley Point Road, lacking any facilities that cause/allow people to mix, build community cohesion or address isolation;
3. The pressure of the Hinkley road and lack of amenities result (especially since COVID) in many residents becoming increasingly isolated;
4. It is very clear that these issues could be addressed together in our only public building - as long as that building can be adapted as well as repaired;
5. The sums of money involved way outstrip any purely local capacity;
6. Our organisation offers the key to addressing our issues, but our current business model is not fit for that purpose;
7. With our very clear links, Stockland is a potentially very interesting place to explore the legacy effects of the Transatlantic Trafficking of Enslaved Africans (TTEA) economy in the rural context;
8. Our environment is rich and varied – and deserves exploration and focus;
9. There was huge community appetite for the project – which persists and grows;
10. People with the right mix of skills are currently available and willing to undertake the work.



<sup>3</sup> [https://www.citypopulation.de/en/uk/southwestengland/admin/sedgemoor/E04008647\\_stockland\\_bristol/](https://www.citypopulation.de/en/uk/southwestengland/admin/sedgemoor/E04008647_stockland_bristol/) - 2021 Census

For many years the accepted narrative was that the church building was suffering from subsidence and that its decay was both inevitable and terminal. With an elderly incumbent and diminishing congregation numbers, that news fractured resolve to raise money and make repairs.

Since 2015, a new Rector has reinvigorated the PCC and several people with energy, knowledge and resolve have moved into the village and are working with the PCC to look again. With an eventual Heritage Fund application in mind, a new inspecting architect was appointed (under HF procurement guidelines) to report on the state of the fabric and refresh the quinquennial report. Thanks to an HPC Community Fund grant in 2019, the architect<sup>4</sup> worked with Structural engineers<sup>5</sup>, other specialists and a Quantity Surveyor<sup>6</sup> to assess the repairs liability, prepare survey plans and work through reordering options. At the same time, the project team consulted community members and local agencies to identify the needs of people and the potential for meeting those needs in the (adapted) church building.

While the professional team was exploring the building and the project team was consulting to assess its community potential, others looked into the history of the parish and its links with the TTEA economy. Extensive consultation with academics in the University of Bristol, local schools and relevant communities (including Daniel descendants from his plantations and correspondence with a descendent of the Stockland branch of the Daniel family) demonstrated that level-headed exploration of the chattel-slavery within the context of an unremarkable rural settlement in Somerset could indeed become a significant national, or even international resource.

The project had reached the stage of drafting an Expression of Interest to the Heritage Fund in March 2020 when COVID hit and HF closed its funds to new applications.

We took advantage of the lockdown and its aftermath by talking individually to any who we thought might be uncomfortable with the project exposing Stockland's connection to a very unsettling past. We were also able to spend time discussing the issues with those who might see us as a potential deliverer of others' agendas. Potential for polarisation following George Floyd's death and the toppling of the Colston statue in 2020 was averted by being able to have protracted discussions, unhampered by deadlines or programme.

Our Expression of Interest, now under new guidelines etc, was submitted and we were invited to submit this application in early October 2022. Following discussion with Cassie Griffiths, although the application was prepared on time, we delayed 'pushing the button' until the November deadline.

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<sup>4</sup> Marcus Chantrey, B<sup>2</sup> Architects of Wedmore: [www.b2architects.com](http://www.b2architects.com)

<sup>5</sup> John Mann, Mann Williams: [www.mannwilliams.co.uk](http://www.mannwilliams.co.uk)

<sup>6</sup> Ian Walker, Ian Walker Associates: <https://uk.linkedin.com/in/ian-walker-2685092a>

Our project, which we are currently developing to secure permissions and funding – including NLHF comprises:

|                                                            |                  |
|------------------------------------------------------------|------------------|
| Contract – repairs and re-fit                              | 1,081,750        |
| Ex-contract conservation & equipment                       | 547,200          |
| Of which: Activities, Interpretation & evaluation          | 136,250          |
| <b>Total</b> , including fees, VAT, inflation, contingency | <b>2,640,530</b> |
| NLHF Grant sought                                          | 1,928,050        |
|                                                            | 73%              |

And to develop our project to the stage for a NLHF delivery application:

|                                                        |                |
|--------------------------------------------------------|----------------|
| Professional Design Team fees (incl VAT & contingency) | 188,778        |
| Activities, Interpretation & TTEA advice               | 49,384         |
| Recruitment, consultation & other costs                | 8,456          |
| <b>Total</b> , including volunteer contribution        | <b>262,338</b> |
| NLHF Grant sought                                      | 199,655        |
|                                                        | 76%            |

## Project Details – what we will do:

Full financial details are in section 6 below and our spreadsheet is appended to the application

The detail of what we intend to deliver during our delivery is included in the application form, reports and surveys attached to this plan, but to precis:

- Our tower and gables will be repaired and our church will make a step-change towards its removal from the buildings-at-Risk Register;
- The worst section of roof will be repaired;
- The community will have its first ever usable public space;
- We will put energy consumption at the heart of our project: heating people (not space) and exploring a user-pays charging system;
- The building will be made accessible throughout, including its WC;

- A modest servery will be installed to serve all our needs, including the honesty cafe;
- Pews will be removed to enable activities; the north aisle will be screened off from the nave and insulated;
- Our bells will be rehung and a new bell-ringing troupe will be trained by our neighbours in Cannington;
- The small, but significant collection of vintage photographs will be conserved, rehung and shared with visitors/online;
- The memorial plaque to Thomas Daniel will be conserved and shown alongside a TTEACH plaque, quietly demonstrating the source of the Daniel family wealth;
- Interpretation materials to enable people to learn about the heritage of the building, the village and its links with the transatlantic trade in enslaved Africans will be installed;
- Resources for the study of the effect of the transatlantic trade in enslaved Africans (TTEA) upon rural communities will be interpreted on-site and put online. Third parties will be sought to curate the web presence in perpetuity;
- We will employ a part-time Activities Co-ordinator for the duration of the project;
- An activity plan will be delivered with a range of targeted activities organised to engage with isolated adults, neighbouring isolated communities, schools, young people and the most vulnerable members of our community;
- Long-lasting relationships will be formed with the Old Vicarage Care Home, schools, South West Coast Path, SASP<sup>7</sup>, SACN, WWT, CCS, HPC, the University of Bristol and other agencies to perpetuate activities and use beyond the duration of the project;
- The ecology of our immediate and wider landscape will be a major focus of our activities and interpretation;
- Special access days for lottery players will be incorporated into our events programme and marketed in Cannington and Bridgwater;
- Events/activities for our more diverse audiences will be co-created with them;
- Regular social events will be organised to address isolation within our community – through CCS ‘Talking Café’ and self-organised;
- Community members will be able to develop more events and gatherings of crafting and other interest groups to reduce their isolation, broaden our audiences and earn money to meet our responsibilities to our heritage;
- Comprehensive evaluation will enable us to learn from the capital phase for future conservation projects, and constantly develop and enrich our engagement programmes;
- Our church will be welcoming – and warmer;
- Our organisation will be on a firm operational footing to sustain the heritage and perpetuate the benefits;
- We will deliver all our promises to our funders to ensure our organisation’s viability into the future.

## Project Development – what we will do

The Delivery application will be made in August 2025 and include:

- Description of project development and any changes between this application and our final project plan;
- Building plans including statutory consultations/permissions, leading to Faculty;
- Any additional surveys commissioned to enhance our conservation knowledge, programme and achieve cost certainty;

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<sup>7</sup> SASP = Somerset Activity & Sports Partnership; SACN = Somerset African Caribbean Network; WWT = Wetlands and Wildlife Trust; CCS = Community Council for Somerset; HPC = Hinkley Point C



- Any/all additional plans as identified during the development stage.
- Evidence of Faculty, List B and planning permissions;
- Full Activity Plan with each proposed activity with an agreed and engaged delivery partner;
- Interpretation Plan demonstrating that desired interpretation is deliverable within the proposed budget;
- IT strategy and plan;
- Evidence of further public consultation to inform interpretation development and public activities;
- Results of consultation through a touch-screen in the church;
- Evidence of consultation and trial sessions;
- Full Business Plan containing capital and operational projections, cashflow, governance, management, market analysis and scenario planning;
- Management & Maintenance plan;
- Shortlist of potential main contractors;
- Details of interpretation contractor and delivery design team;
- Cost certainty
- Match-funding plan – to be achieved prior to gaining Permission to Start;
- Job Description for the Activities' Coordinator and volunteer role profiles;
- Any required formal agreements;
- Mitigation against all perceived significant risks;
- Evaluation of development phase

### **Our Activities and Beneficiaries:**

As well as preparing and consulting around the physical developments, we have put considerable focus on our potential beneficiaries. As the Established Church, the entire population of the joined parishes is in our remit, and the congregation is fully integrated into the general plans. In preparing our HPC funding application we consulted widely with stakeholders and potential delivery partners (see activity planning brief – APPX 1).

Our project is predicated on fostering three principal strands of community benefit:

1. People within our local community at risk of isolation and loneliness;
2. Our community itself, at risk of becoming increasingly isolated from our neighbours with tricky road access and nothing to bring people here;
3. The many integrated communities (not necessarily geographical) studying, affected-by or maintaining/building an interest in the residual effects of the transatlantic trafficking of enslaved Africans (TTEA).

Each of the three areas is being developed as a separate 'business focus' to cater for the differing needs of the different audiences. Each comes with delivery partners and all activities are to be developed with a keen sense of sustaining activities beyond the project. There are, of course overlaps and it is our intention that the interpretation offered (online and in the building) will encourage cross-over. At this stage of project development, the key delivery priorities that we have identified are:

1. People within our local community at risk of isolation:

- Aging residents – the nature of the housing market, particularly over the last two decades, has squeezed out young people from villages, including those brought up here and in our surrounding communities. At the other end of life, the lack of amenities and transport cause many people to move to better connected places before they have to give up driving. Consequently, the population 'mode' is people in middle age and older and our aim is to ensure that the community rallies to enable people to continue to live in their houses as long as they wish by creating a centre for mingling, exchanging information and pursuing mutual interests. Specific (seemingly minor) issues, such as acquiring a new phone or a minor IT glitch, can become life-changing without recourse to a bit of help and the confidence to ask<sup>8</sup>;
- Residents of the Old Vicarage – although our (award-winning) care home has a lively programme of activities, its residents often become isolated within their immediate environment as the village has no place to explore, take visitors or to meet their new neighbours. Activities, events and our café will provide that facility and the owner of the care home is eager to join in, share the organisation's expertise in creating accessible places and activities - and take a full part in integrating the home into village life;
- Empty nesters and newly retired – as people retire, despite many young graduates and older children having to continue to live with parents - they can have problems adjusting to their new circumstances. Frequently, having spent years working full time and ferrying youngsters in the evenings and at weekends, they find themselves knowing very few people in their community and are unaccustomed to socialising in the village. Our project will offer a public space for people to gather and create friendships, without our current restriction of only having a choice of each other's' houses or the (evenings-only) licensed club;
- Young people – In a village the size of Stockland, generic group activities for different age-groups are not always appropriate. Currently we have three children under 10 resident in the parish, seven between 10 and 18 and a number of young people returned home after studies (or unable to afford to move out). However, there are also many visiting grandchildren and none of them has much opportunity to meet. As that range will have already changed by the time we are ready to deliver the project, our intention is to work directly with parents and grandparents (here and in neighbouring communities) to facilitate bespoke activities to engage their known interests: to enable the young to develop a relationship with the place, environment, their neighbours and their peers - rather than always having to drive out of the village for all activities, school and hobbies.

2. To off-set the isolation of our community:

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<sup>8</sup> At the time of writing, this need is growing as the downturn has resulted in 6 houses being currently on the market – and sticking. Four of these sales are to enable people to move nearer facilities as they lose confidence in driving. The need for the community to be able to give support is growing tangibly.

- Partnership with the Community Council for Somerset (CCS) to create a monthly ‘Talking Café’<sup>9</sup>. The Village Agents, working for CCS have an established network of talking cafes in rural communities. Their purpose is to host a social event and signpost people to meet their social and other needs, bringing in IT specialists, social care advisers and other agencies for whom contact/advice can be difficult to organise. CCS currently runs cafes in Bridgwater and Williton and are keen to come to Stockland to meet the needs of the many villages and hamlets that lie between the current facilities. The Talking Café will be widely advertised to bring people into Stockland for this much-valued service;
- Tourists and walkers on the SW Coast Path<sup>10</sup>. We are one straight mile (on public footpaths) from the coastal footpath. We will be sign-posted from the path, advertised on the leaflets, marketed alongside other providers on our stretch of path and provide an Honesty Café alongside our interpretation. We are already in touch with the appropriate agencies and partners and a leaflet is currently in production outlining a circular walk featuring Stockland. The County Council has recently upgraded all the gates on the route and is in discussion with landowners to maintain and upgrade the paths;
- Ecology tourist and students - In partnership with the Wetlands and Wildlife Trust (WWT) operating out of Steart, the church will serve as an education base and learning centre for groups and individual visitors to the reserve. This will save WWT from needing to construct a new facility on their main site and enable them to promote the fuller story of the Stockland (freshwater) marsh and the landscape/ecological transitions from Stockland through to the saline terrain at Steart – and the coast;
- Primary school environmental students – to our initial surprise, teachers have shown great interest in using our churchyard as a resource for their children to study the flora and fauna of the locality. The churchyard is already well managed for biodiversity and the ecology report has further enabled us to enhance the management, identifying presence of Greater Horseshoe bats (and others). The fact that the churchyard is walled (and our street really quiet) offers teachers confidence in letting children explore the space. Our immediate proximity to the marsh (entirely via a public footpath) offers huge scope for wider ecological/environmental studies. For older pupils, the one-mile walk through pasture, arable, woodland and farmyards to the estuary coast has great scope for a wide range of environmental and heritage studies (there are several survivals of the heavy Severn defences constructed c1940 when invasion from the west was anticipated, many generations of sea defences etc);

3. The pivotal effect of the transatlantic trade in enslaved African people upon this rural community:

- School children – in partnership with local academy groups and others (to be developed significantly during development phase). Local primary schools (and Brymore secondary – a state boarding school located in Cannington) are very keen to work with us to create a heritage resource for the study of the transatlantic slave economy, but relevant to their pupils’ context and daily lives. Teachers have expressed how current resources are universally centred on cities and the USA, enabling their students to think of the subject as not being really relevant to them and their

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<sup>9</sup> [Village Agents | Talking Cafes \(somersetagents.org\)](http://VillageAgents|TalkingCafes(somersetagents.org))

<sup>10</sup> <https://www.southwestcoastpath.org.uk/>

environment. Whilst local schools are keen to visit the site, we recognise that our geographical position will preclude many others from visiting, causing our main drive here to put material into educational (and other) on-line resource packages;

- Heritage tourists and students interested in our interpretation relating to our community and the effect of TTEA. We are working closely with the Somerset African Caribbean Network (SACN), academics in Bristol and descendants of both Stockland and Caribbean branches of the Daniel family. Whilst much of the information relating to this aspect of our heritage will be produced as on-line resources, on-site interpretation will also tell the story for those who come here specifically to explore, or who happen upon this heritage whilst visiting for another purpose;
- University and other scholars – we are working to lodge the example of Stockland into go-to learning resources. On-site, our interpretation will enable people to explore the subject in reference to how the lives of simple English farming people were radically affected by something seemingly so remote from their experience. Off-site, we will promulgate our story as far as possible to people and sites providing a logical information route for students and interested parties. We are currently adding to our Wikipedia page<sup>11</sup>, having been widely advised that this is the general first stop for people embarking on research;
- ‘stealth’ audiences – people who are exploring our community on-site or on-line, visiting our honesty café whilst on a coastal walk, visiting relatives in the care home – or come to admire our cowslips - will almost invariably be alerted to our heritage through our interpretation or physical indicators. Care will be needed to balance the need for the place to be lovely to visit and for villagers to use extensively, whilst promoting this aspect of our heritage;

4. An additional audience that falls into none of these categories is the contractors at Hinkley Point who are at risk. With 10,000 people a day on-site, many away from families and living in hostels, HPC has a wide range of mental health and addiction issues, some critical. We are in discussion with the welfare staff (and chaplaincy) and they are considering using the church as an off-site place for one-on-one meetings, therapy sessions and small groups, recognising that the church is very nearby, but gentle in tone and totally different from the buildings and facilities on the site.

Currently we see our principal interpretation themes as being linked to three over-riding areas: village heritage, TTEA heritage and environmental heritage. These will be worked up through consultation with our proposed beneficiaries, research and through engagement with our (tba) interpretation designer at the development stage.

Our Activities will be worked up through consultation during the development stage. Activities as they have developed so far are outlined in our application form, accounted for in our budgets and itemised in the Activity Planner’s brief in APPX 1.

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<sup>11</sup> [https://en.wikipedia.org/wiki/Stockland\\_Bristol](https://en.wikipedia.org/wiki/Stockland_Bristol)



The Urgency – why now?

Grade 2 listed St Mary Magdalene Church was entered on the Historic England’s South West Heritage at Risk register in 2015 with entry number 1059049. Its condition is stated to be poor and this is confirmed in the Quinquennial Inspection Report dated June 2019 prepared by the church architect<sup>12</sup>, now Marcus Chantrey.

The QI report is detailed and specific. The PCC (with widespread community help) has maintained the building in terms of keeping gutters clear and restricting ivy growth (moved on since the Buildings at Risk photograph). Recent repairs have been made to the most urgent windows and a significant repair to the vestry in 2019 severely depleted any reserves.



|                    |                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|--------------------|------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| SITE NAME:         | Church of St Mary Magdalene, Stockland Bristol | <p>Parish church built in 1865 of blue lias rubble stone. Designed by Arthur of Plymouth for the Daniel family of Stockland Manor. Roofs need re-covering and there are a number of slipped tiles. Structural stability is poor with cracking to window surrounds and major fracture through the tower, loose and bulging stonework. Some repairs to valley gutter and one window which was blown in, were carried out in 2017 and in 2019 the kneeler and copings to the vestry gable were reset. The parish is putting together proposals for repair but the church remains in a very poor state.</p> <p>Contact: Annie Evans 0117 975 0673</p> |
| DESIGNATION:       | Listed Place of Worship grade II               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| CONDITION:         | Poor                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| PRIORITY CATEGORY: | C (C)                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| OWNER TYPE:        | Religious organisation                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| LIST ENTRY NUMBER: | 1059049                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |

© Historic England

Whilst the roof is reaching the end of its useful life, all but the main south slope is still serviceable and slipped tiles can be repaired/replaced. Although the rest of the roof will need to be addressed in the near future, this project does not include its comprehensive re-battening and relaying. The tower is our main preoccupation as the top parapet is in dangerous condition, the newel stair (gloriette) is coming away from the main structure and water ingress is causing swelling of the iron cramps. The detailed schedule of proposed works is included in the application form and in the QS Cost Order attached to the application.

Devoid of water supply, w/cs or effective heating, as the building deteriorates further it becomes less attractive and therefore increasingly difficult to retain our supporters or attract new audiences. As a result, our relevance to community life diminishes as does our ability to raise funds locally to address our spiralling fabric needs, let alone address the costs of reordering as a community asset. The building is in need of restoration, refurbishment and reordering in order to ensure it is safe, fit for purpose and sustainable both as a place of worship and to grow wider community use.

However, alongside threats, there are also opportunities: the proposed scheme, which currently enjoys enthusiastic support (letters of support appended to the application), from the community, regional social care agencies and other potential partners (appended to the Activity Planner brief APPX 1), addresses the critical need for remedial works to be carried out to preserve the heritage of the building as well as catering for community use as detailed in our application. In addition,

<sup>12</sup> The previous QI architect, Annie Evans, declined to tender for the contract, but is in close contact with Marcus

the project is well within the ability, capacity and experience of the assembled project team to deliver. The project will also be used to add to review the governance for the building and up-skill our community to raise funds and plan subsequent phases.

The structural need is urgent, our community is at a crossroads in terms of isolation and fragmentation and we currently have a group of people with the experience, energy and commitment to see the project through.

- The people, the energy and the key information are in place to see the project to completion;
- Our building is effectively useless for anything beyond worship for the hardy few who are prepared to battle the cold (even now excluding potential worshippers from the Care Home and elsewhere who find it too cold and dark to be attractive);
- Without investment our tower will fail; our bells have already been silent for more than forty years. However, the project has sparked keen interest in reviving the bellringing tradition in Stockland. We have a group ready to form, training lined up through the Cannington bell ringers and encouragement to use the Otterhampton bells (CCT<sup>13</sup>) to train before our peal is serviceable;
- Without investment, we will be unable to engage with new audiences and our active community will dwindle without any 'common ground' to meet and socialise;
- Among both old and young there is an epidemic of mental health issues around anxiety, lack of self-esteem, confidence, isolation and disconnection from their community. The evidence is that this has been hugely magnified by COVID. The project is already working more closely with local schools to build a strong foundation based on cultural capital;
- Several larger initiatives (WWT, HPC, CCS, SWCP, SACN<sup>14</sup>) are all eager to engage with us to deliver their activities in our building. If we are unable to progress, they will find homes elsewhere;
- The time is absolutely right for communities and churches to explore, share and interpret their historic connections with colonialism and the transatlantic trade in enslaved people. Stockland Bristol is a prime and clear example that could be an invaluable resource for those discussions, both physically and remotely via the web.

## Why the Heritage Fund?

The HF is the clear go-to fund as it will enable us to realise our community aspirations, celebrate our environment, provide a valuable resource for the study of difficult histories – and rescue otherwise doomed heritage. Without HF investment, the project is too daunting for a community of this scale to contemplate.

Beyond the scale of the investment needed, the Heritage Fund is the only fund which will address our triple-bottom-line of heritage ambitions: repair, community and interpretation.

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<sup>13</sup> Churches Conservation Trust

<sup>14</sup> Wetland and Wildlife Trust at Steart, Hinkley Point C, Community Council for Somerset, South West Coast Path, Somerset African Caribbean Network

Our two successful applications to the HPC Community Fund to develop the project to this stage have encouraged us in our ability to raise match-funding. The fund has acknowledged that whilst we will not be seeking money from them for the development phase, we will be making a major application for the delivery. We are within the geographical orbit for Landfill grants and have an outline fundraising strategy for targeting appropriate grants and foundations. APPX 2. This strategy has been looked-over by the Fundraising Officer for the Diocese, who advises that it is realistic in both terms of ambition and resource.

A key feature of our success with the HPC Community Fund has been our structuring of the project to the HF process. At each application we have sought funding to only take the project to the next relevant stage without commissioning reports or work is time-limited, or might otherwise be wasted should our HF application falter. Other funds will also be assured by our engagement with the HF as assurance of our ability and our commitment. They also know that HF investment requires demonstration of consultation, evidence of need and sound financial planning – both for the capital phase and the operational legacy.

In short, HF understands the interrelated nature of heritage with people/environment/community and has huge experience in supporting organisations to translate aspiration into seriously costed, programmed and risk-assessed plans. In addition, engagement with the fund ensures that projects cannot lose sight of the ultimate intended beneficiaries, helping the development and delivery teams to protect the activities and interpretation budgets from virement.

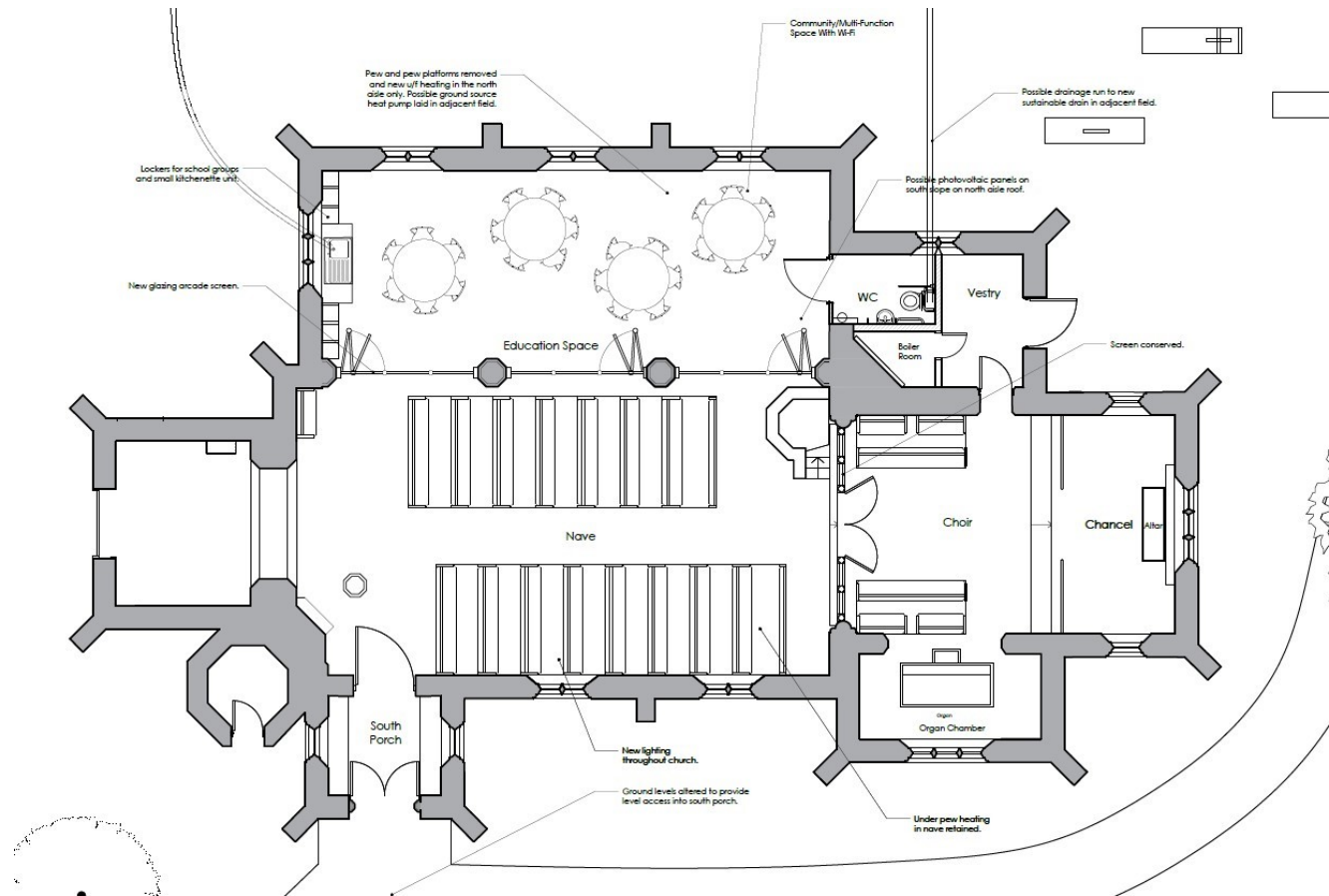
The Project is of a scale and complexity that it is hard to envisage it being successfully achieved without the support of the NLHF.

### **What happens if the project doesn't happen? –**

Despite holding it together thus far, we are at a crossroads for our building, our community and our sustainability:

- Our new residents will find it ever-harder to meet neighbours and contribute to/benefit from this community;
- Older residents will become increasingly isolated and be forced to move away quicker than they need;
- The Old Vicarage will lose the chance to integrate their more able residents into the community;
- WWT will build a new-build education facility;
- Local (and not so local) students will not be able to study (through Stockland) how the transatlantic trade in enslaved Africans permeated every corner of England;
- Without intervention and significant, expensive and overdue repair our tower will become unsafe;
- Our gables (swelled blue lias) will become unsafe and could fall into the building;
- Our embryonic campanology group will fall away and our bells are unlikely to ring again;
- The skill and energy currently available to fulfil the project will dissipate and the project team members will move to other endeavours, causing much of the work and investment carried out thus far to be wasted;
- The anticipated match-funding from HPC Community Grant and elsewhere will be lost. The HPC Community Fund is due to be wound up within five years and this major match-funding opportunity would no longer be available to our successors;

- If the church goes into stasis at this time of change in the community it is likely to become uncherished and derelict as an irrelevant relic of a lost past;
- Without this project our engaged community will gradually, but inexorably decline, our income will decline with it and our building will embark on a spiral of decay until, at some later stage, another group comes together to try again – or not.



*The plan for the church showing the north aisle community space*

## Our Financial Strategy:

### Project:

To maintain momentum (and keep addressing risk-mitigation during the assessment period), our project management and Governance teams will:

- Continue to develop our faculty application between this submission and permission to start our development phase. We have already met with the DAC, with our options appraisal and proposals, Statements of Need and Significance etc – and achieved their outline support). Pre-empting possible faculty delay, we are also in contact with Historic England and will be contacting the Victorian Society at the appropriate time. This is all to allow a generous period for fundraising during the development stage as most grant bodies now require faculty before they will consider an application;
- Continue to consult with potential funders as well as refining our match-funding strategy;
- Stay in consultation with our prospective delivery partners for activities – managing expectations;

This will continue throughout the development period in the financial context that at delivery, we will:

- Avoid financing the project through loans;
- Only consider taking out temporary loans as a cash-flow option, but not as capital funding;

### Operation:

Following the capital repair and north aisle repurposing works enabling the operation, Stockland and Steart Peninsula PCC will:

- Operate the north aisle as a separate business/fund-raising centre within the PCC accounts;
- Continue to operate Stockland church as a discrete parish entity within the larger group of parishes;
- Continue to operate as a sustainable not-for-profit organisation;
- Continue to open Stockland church daily and with free entry;
- Continue to work with community volunteers to manage our churchyard to enhance the environment;
- Continue to work with the community to organise events that help pay for the maintenance of the building;
- Continue to work with the project group as it organises the on-going capital development programme;
- Run all aspects of our work as volunteers, other than the (project) post of activities coordinator our incumbent, administrator, retained architect and specialist providers on ad hoc bases;



- Balance our income generation against needs outlined in the Maintenance & Management (M&M) plan<sup>15</sup> – to include refreshing any activity resources and interpretation materials;
- Reduce our reliance on gift-based income streams wherever possible;
- Ring-fence any M&M underspend for investment in maintaining and enhancing both the building and the visitor experience.

We are very clear that, although not a business, we need to operate in a business-like fashion, minimising waste, optimising resources and safeguarding our people, those who engage with us - and our reputation. It is also important that all our volunteers at all levels feel valued, feel respected – and have fun.

We will train our volunteers appropriately to enable them to feel competent and confident in their engagement, but activities for specific groups with specific needs will be delivered in partnership with organisations who understand the needs/vulnerabilities of their clients and who will provide the specialist curriculum and support to bring success. Volunteer roles will be worked up as the activity planning and potential partnerships consolidate during the development period. Community volunteers will be subject to the same safeguarding and other policies as PCC volunteers – and be offered appropriate training. Whilst the expectation is that partner agencies will be accompanying children and vulnerable adults, any required DAB checks will be done in good time as part of preparation for activities. We already review our safeguarding policy regularly.

The PCC will remain as the key management and governance vehicle for the operation of the church and its activities post-project. At the development stage we will continue working with community members to identify people to take on aspects of the project and activities according to individual volunteers' strengths and interests. Having talked to other projects (and taken HF advice), we have included a budget to employ an Activities Co-ordinator for three years during the delivery phase of the project to help with the co-ordination of the new activities. We intend to develop our business plan to sustain at least part of that resource into the future, once the project has finished.

Although the need for our project has grown through the pandemic, we acknowledge that the issues were already apparent before COVID and will be developed as a continuum of an already-developing social need.

We are very conscious that, in terms of market analysis and public data, the size of our community frequently renders population statistics unreliable. We have mentioned above that our officially very aged population is the cause of our having residents of a single Care Home constituting some 15% of our population, but beyond the Old Vicarage, many sept/octogenarians and long-standing residents have already relocated to be nearer communications and services. Analysis of the 2021 census already show anomalies in that the age profile of our children has changed and several more residents have activated their right to EU citizenship. A long-standing Muslim resident had died shortly before the census, but two have moved in since – the census shows zero people identifying as Muslim in our community. There are currently (September 2023) six houses for sale in the village; it will be very possible that the incoming buyers could bring marked demographic change.

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<sup>15</sup> To be worked up for the delivery application

To embrace this, we will ensure that income-generating activities are targeted very specifically to the needs of the community at the time of their development. We can be sure that certain needs will persist (IT support, reduction of isolation, WWT learning facility, honesty café and CCS Talking Café), but others will be tailored to meet needs, aspirations and enthusiasms of their specific audiences.

## OUR PROJECT:

### Work so far to bring us to this stage:

#### Fundraising

- 2019 – HPC Community Fund - £9,100 for information-gathering to bring us to NLHF Expression of Interest
- 2023 – HPC Community Fund - £8,100 to develop to NLHF Development Grant application
- 2020 – on - £600+ private donations, Exhibition proceeds etc

#### Conservation:

- Quinquennial reports leading to masterplan
- Options Appraisal
- Comprehensive archive searches for images, records and evidence of church developments and alterations
- Cost planning and QS overview of architect reports and proposals
- Discussions with DAC + DAC site email confirming outline support
- DAC approval 'in principle' regarding reordering and repair. Detailed faculty and List B permission during Development stage
- Environmental support by Geckoella of Watchet;
- Archaeologic Report by Keith Faxon to inform drainage decisions

#### Activity/Business Planning:

- Outline Statement of Significance – APPX 3
- Outline Statement of Need – APPX 4
- Community Consultation – See Activity Plan Brief in APPX 1
- This Outline Business Plan
- Oversight from Ruth Gofton (Heritage & Community) for activity and evaluation planning
- Partnership with Somerset African Caribbean Network
- Expression of interest – October 2022
- Fundraising strategy (APPX 2) + initial informal contact with major potential funders

- Initial consultation with potential activity partners – included in the activity plan brief in APPX 1

All these work packages will be further developed between this plan and submission of the development grant application.

### Money invested since the project started:

| Date                        | Work                                    | Contractor                | Cost £ (including VAT) |
|-----------------------------|-----------------------------------------|---------------------------|------------------------|
| <b>Project Development:</b> |                                         |                           |                        |
| 2020 (HPC Fund)             | Architect fees                          | Benjamin & Beauchamp (B2) | 3,484.50               |
|                             | Structural Engineer                     | Mann Williams             | 1,128.00               |
|                             | QS                                      | Ian Walker Associates     | 660.00                 |
| 2022                        | Architect & QS update for EoI           | B2, Ian Walker            | Pro bono               |
| 2023 (committed) (HPC Fund) | Architect fees                          | B2                        | 1,800.00               |
|                             | Drainage Survey                         | B2                        | 600.00                 |
|                             | Ecology Survey                          | Geckoella, Watchet        | 1,548.00               |
|                             | Archaeological preliminary study        | Keith Faxon               | 480.00                 |
|                             | QS update                               | Ian Walker                | 960.00                 |
|                             | Application & activity planning advice  | Ruth Gofton               | 1,500.00               |
|                             | SACN consultation in Yeovil (room hire) | Manor Hotel, Yeovil       | 65.00                  |
| <b>TOTAL</b>                |                                         |                           | <b>12,225.50</b>       |

### Our Development Project:

The development of our project is programmed between achieving permission to start (spring 2024) to submitting our delivery application for September 2025. Thanks to the HPC Community grants, we are well advanced in our planning and much of the development period will be in structural and archaeological exploration to achieve faculty/List B consents and match-fundraising. During that period, we will also hone and confirm our delivery partnerships and activities as we write our Activity Plan, Interpretation Plan and continue to develop our business planning. Much additional time and effort will be spent consulting with others to ensure that our plans remain relevant, cost-effective and needed.

The detailed development programme is on page 32, in APPX 5 at A3 scale and as an attachment to this application, but our key dates are:

- November **2023** *Submit Development Grant Application – of which this Outline Business plan is an element*
- now – March Continue to develop plans and documentation for faculty (at our own risk)
- March **2024** Decision
- April Permission to start, recruitment of specialists & begin next phase of consultation
- September Surveys complete
- December Begin match-fundraising in earnest
- March **2025** Planning & Faculty granted and full QS process underway – *generous faculty period as not in our control*
- March Draft activity, business, Interpretation, Architects and other reports for
- May Mid-term review and governance
- May - July Consult on draft documentation
- August Submit Delivery application

We are in a good place in terms of our consultations and activity planning and we are confident that we can develop a business model that will meet our increased management, maintenance and activity costs whilst sustaining the body and spirit of our project beyond its formal completion. Given our lack of reserves we have given exhaustive attention to costs and risk.

The development programme and application date are geared around allowing time contingency for achieving the final faculty as this is not in our control. This programme also allows us to time our permission to start the Delivery stage, tender and start on site with the bat movements, hibernation and breeding seasons.

The detailed financial information relating to our Development Phase application is on page 40.

Having benefited from two HPC Community grants thus far to bring the project to this stage we are seeking £ 199,655 - 76% from HF for our project development.

### Development Risks:

For the development stage of our project, we have mitigated risk by working with a team of professionals to advise and undertake most of the technical work. Having engaged Conservation Buildings Surveyor Tom Wright on to our project team<sup>16</sup>, we have great confidence in our ability to judge and discuss professional advice. As our documentation demonstrates, we have undertaken significant consultation and activity planning to ensure that demand exists for our proposals and the people and organisations are willing to engage as potential delivery partners.

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<sup>16</sup> Tom is a resident in the village and is currently working as a volunteer. He is in conversation with his employer that, if we are successful in our development application, he will be given time to work on the project *pro bono* as CPD

Of course, the risk of failing to achieve the match-funding requirements by the time the NLHF considers our delivery application is critical, but we are in discussion with HPC Community Fund as a potential major funder and are putting a lot of emphasis and focus on fundraising. We know from other projects that most grant-aid bodies will only consider applications that have achieved faculty/planning permissions. Whilst this makes it difficult to raise funds in the early stages of the development stage, we are confident that our already being in close contact with both DAC and the statutory consultees we will be granted faculty according to our timetable - leaving us time to make funding applications. We are in discussion with Valencia (our regional Landfill organisation) which acknowledges the complexities of combining landfill and HF grants and are prepared to be as flexible as possible.

We appointed the project architect (using NLHF procurement guidance) in 2019 and the successful applicant – Marcus Chantrey of b2 architects of Wedmore<sup>17</sup> – has surveyed the building, undertaken the options appraisal, prepared (and submitted) outline information for faculty and commissioned both structural and drainage surveys. In addition, we have commissioned a report with quote for the bells from Nicholsons and have budget figures from accredited paper and enamel conservators for those elements of the work. We are confident in our ability to procure all Interpretation, Activity, Business and other consultants efficiently.

The outline ecology report (commissioned<sup>18</sup> in Summer 2023 and attached to this application) has identified the extent of our bat population and confirmed that there are no other species (flora or fauna) that will complicate building plans or programmes. Geckoella will continue surveying at Development stage to identify opportunities for engagement and improvement and will undertake community engagement activities at both development and delivery stages.

Our Archaeology Report (commissioned<sup>19</sup> in Summer 2023 and attached to this application) has given us indication on where and how best to develop our plans to minimise compromising the archaeology. It will also be the foundation for any required written reports for faculty; watching briefs will be incorporated into the relevant sections of the tender documents.

Although less financially confident than we might have been in 2019 because of major recent external (inflation) issues, we do not foresee PESTLE risks derailing our project. The general election is likely to fall within our development period so HF being put into purdah should not affect our programme. However, should HF be in purdah from March to May, we will (assuming that we have received a verbal report of our success) have to begin some of the early survey and design work – and recruitment – at our own risk before we have the official permission to start

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<sup>17</sup> At the point of submission, we learn that Marcus Chantrey has set up his own company. We will investigate between now and decision-date to see the status of Marcus's involvement and if we need to retender his contract.

<sup>18</sup> Geckoella, Watchet [www.geckoella.co.uk](http://www.geckoella.co.uk) Geckoella was appointed following consultation with WWT Steart and local ecology experts. Their initial brief (<£2,500) was to survey the building and churchyard for flora/fauna, especially protected species, that would need provision when planning the capital programme + initial observations for environmental activities. They have scoped the development and delivery restrictions and opportunities.

<sup>19</sup> Keith Faxon Archaeology. Keith was appointed (<£500) to scope the archaeological implications for our proposals, including the access works and to inform the drainage discussions.

The wild price/supply-chain fluctuations around trade and import/export arrangements post-Brexit appear to have settled somewhat. Our calculations for inflation and contingency reflect the situation and we have been advised by our QS and HF regarding these levels. If cash-flow permits, we will purchase as many materials up-front as we can to protect the project from new shocks.

The risk and mitigation registers (as they currently stand) are on page 49 below, shown in A3 in APPX 5 and are attached to our application.

## **OUR ORGANISATION:**

### **Management & Governance**

As set out below, following our recognising that the PCC lacks sufficient capacity to undertake this work on top of all its other duties, our project is to be developed and delivered by a project group largely made up of community members:

#### **Stockland Bristol & Steart Peninsular PCC:**

Stockland Bristol and Steart Peninsula PCC is a statutory body set up under the Parochial Church Councils (Powers) Measure, 1921. It conducts its affairs in accordance with the PCC (Powers) Measure 1956 and the Church Representation Rules. The method of appointment of PCC members is set out in the Church Representation Rules 1969 (as amended). The membership of the PCC consists of the Rector, Curate, churchwardens and members elected by those members of the congregation on the electoral roll of the ecclesiastical parish. All church attendees are encouraged to register on the electoral roll and stand for election to the PCC. The PCC members are responsible for making decisions on all matters of general concern and importance to the parish including deciding on how the funds of the PCC are spent.

The PCC members are:

Rector: The Rev'd Alison Waters, Chair

Church warden: Ray Johnstone-Smith

Elected members: Rosie Best (Treasurer), Vanessa Johnstone-Smith, Mary Bartlett

The PCC meets every 2 months



The parish has been joined with Otterhampton and Combwich since 1971 and with Cannington since 1984. The grouping has recently been extended to include Stogursey and Fiddington. The PCCs will remain autonomous within the new structure, with the combined clergy complement of two.

Stockland is the largest church in the parish with the neighbouring village of Combwich being served from an erstwhile chapel of ease – Otterhampton church being vested with the Churches Conservation Trust. There is an outlying chapel (St Andrews) on the Steart peninsula which has 2 or 3 services a year.

## The Project Team

The core project team for both development and delivery will be:

Rev. Alison Waters – Chair.

**John McVerry**<sup>20</sup> – Project Manager

Rosie Best – Treasurer

Vanessa Johnstone Smith – Secretary and Community

**Tom Wright RICS** – Heritage and repairs; process management of capital phase

Marcus Chantrey – Architect

TBA – Activities Planner (development only)

TBA – Interpretation

Integral to the project are also (in alphabetical order):

- Dick Best, Richard Foyle & Chris Thompson – ecology & environment
- Bryony Carver – Bells and bell-ringers
- Tim Carver (and others) – fundraising
- **Ruth Hecht** – Bristol based researcher/historian with 40 years' experience of managing cultural projects in communities who has been researching mercantile families and their legacy linked to the slavery economy; Ruth is also an indirect descendent of Thomas Daniel;
- Claire Honey – Research and general project assistance
- Ray Johnstone Smith (research, access and PCC/project liaison)
- Jenny McCubbin – Parish Footpaths Officer and SW coast path liaison, WWT liaison, community fundraising
- **Michelle McDines** – IT & website

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<sup>20</sup> **BOLD** signifies working professionals donating their time and expertise

- **Adrian Murphy** – Governance, procurement & energy management
- **Sam O’Brian** – Owner of the Old Vicarage Care Home - Accessibility
- **Susann Savidge** – Somerset African Caribbean Network
- Steve Trelfa – Research coordinator
- **Ian Walker** – QS – recalculated pro bono in 2022

We are also in close touch with many agencies and other subject professionals offering their voluntary input

### **Project Development – management:**

The development of the project, including fundraising and delivery application will rest with the Project team. The PCC will continue as the applicant and be the project ‘owner’ in terms of governance.

John McVerry will take the role of Project Manager for both development and delivery stages, backed up by Tom Wright and the PCC Treasurer Rosie Best. John will act as client-contact for the architect and building up the capital work as well as developing the delivery application in terms of recruiting and supervising the consultants forming the project team (All relevant briefs at APPX 1). He will ensure that all documentation is provided in good time for effective governance – and manage the risk register. He will also serve as main contact for NLHF and undertake correspondence and draw-down.

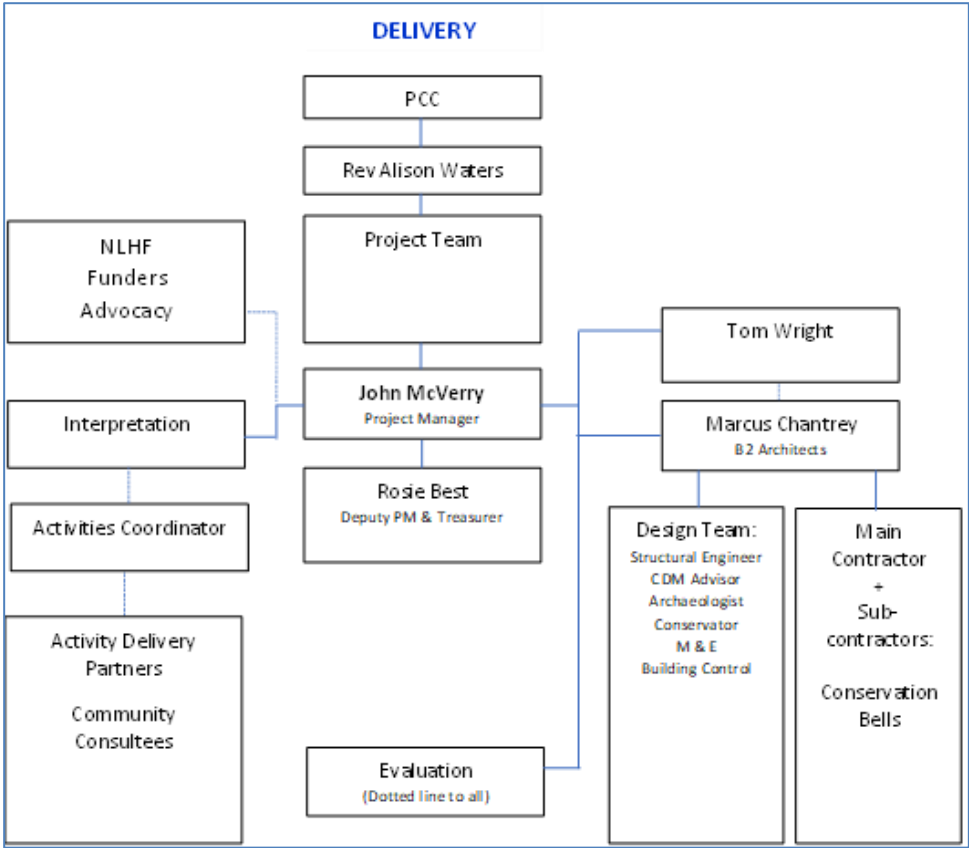
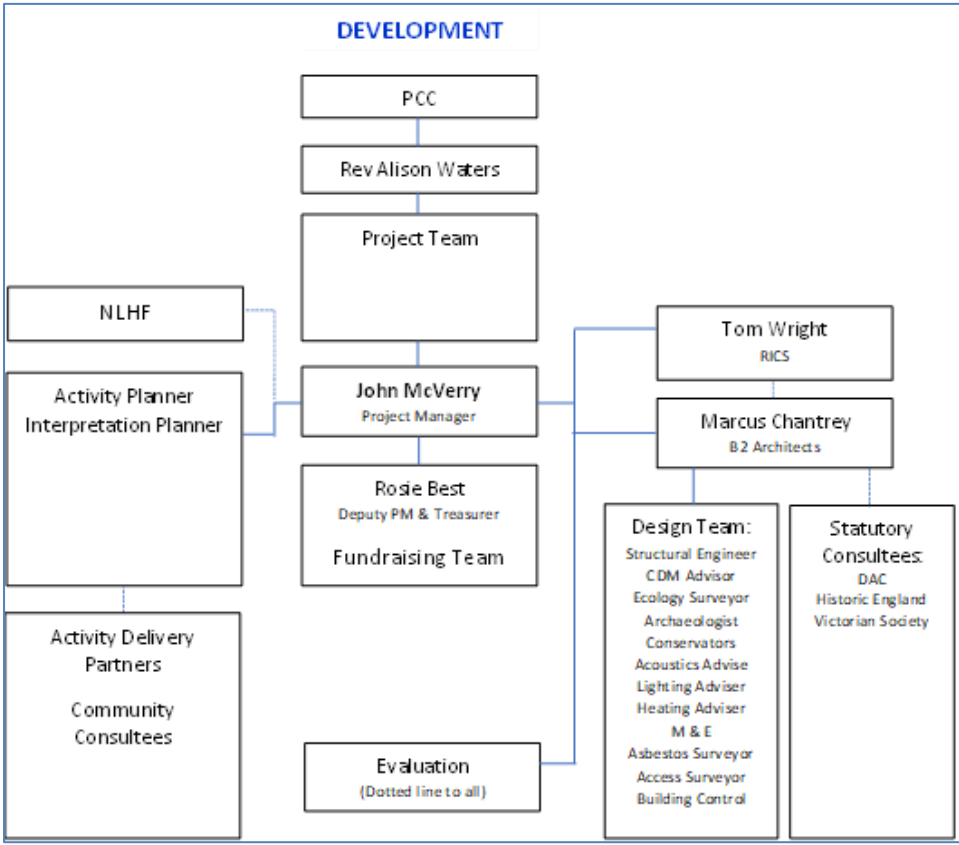
### **Project Delivery - management:**

At Delivery stage, the capital programme and project administration will be undertaken by the project team, reporting to the NLHF and to the PCC for governance. The capital building works will be achieved through the contractor working to the architect, reporting to John McVerry – who will also manage the Activities Co-ordinator to deliver the Activity Plan. Named community members will act as key end-users and then take responsibility for the wider programme of events and income-gathering activities, building the means to sustain the building and activities beyond the life of the project.

At this stage we are planning to follow the example of West Huntspill NLHF project and undertake the internal works first, allowing community engagement and income-gathering activities to establish at the earliest opportunity. Whilst this denies the ‘grand opening’, the Huntspill experiment paid dividends in terms of bringing people quickly to ‘own’ the project. This model also facilitates access to the capital works and ecology/archaeological explorations – as well as bringing income at the earliest opportunity.

At both stages, John will be assisted by Tom Wright for capital matters and he will create and manage the Activities Group to give him assurance that everything planned is viable, needed and linked in to regional and local initiatives. Rosie Best will continue as Treasurer.

Once appointed, the Activities Coordinator will be responsible for delivering the Activity Plan with (and on behalf of) the Activities Group and the PCC.



## PROGRAMME:

Our timetable has been set around matters of practicality and feasibility. The setbacks of the failure of our initial EoI - and COVID have put us further back than we would have chosen, but conversely, we have been able to use successful applications to the HPC Community Fund to move our project development on with this business plan and significant community consultation.

We are well advanced in our conservation and reordering planning and feel that we have an appropriate level of cost-certainty for this stage. We have achieved an agreement in principle that our reordering and use plans will be supported by the DAC. We will also take their advice to split the work into several discrete faculty applications to avoid the bigger-picture developments being stalled by deeper discussions around finer points of design or specification.

We remain in touch with a number of other HF projects learning about their successes and areas of the work that they suggest we should do differently from them.

Allowing a month to achieve permission to start our delivery, all the issues on our critical path (capital) have been worked up with the professional team, tested and will work to this programme, but with little room for prevarication. Of particular note is that we need to fit our capital works around the winter roosting and breeding of (particularly) the greater horseshoe bats. We are confident that all stakeholders have been considered and accommodated within this schedule.

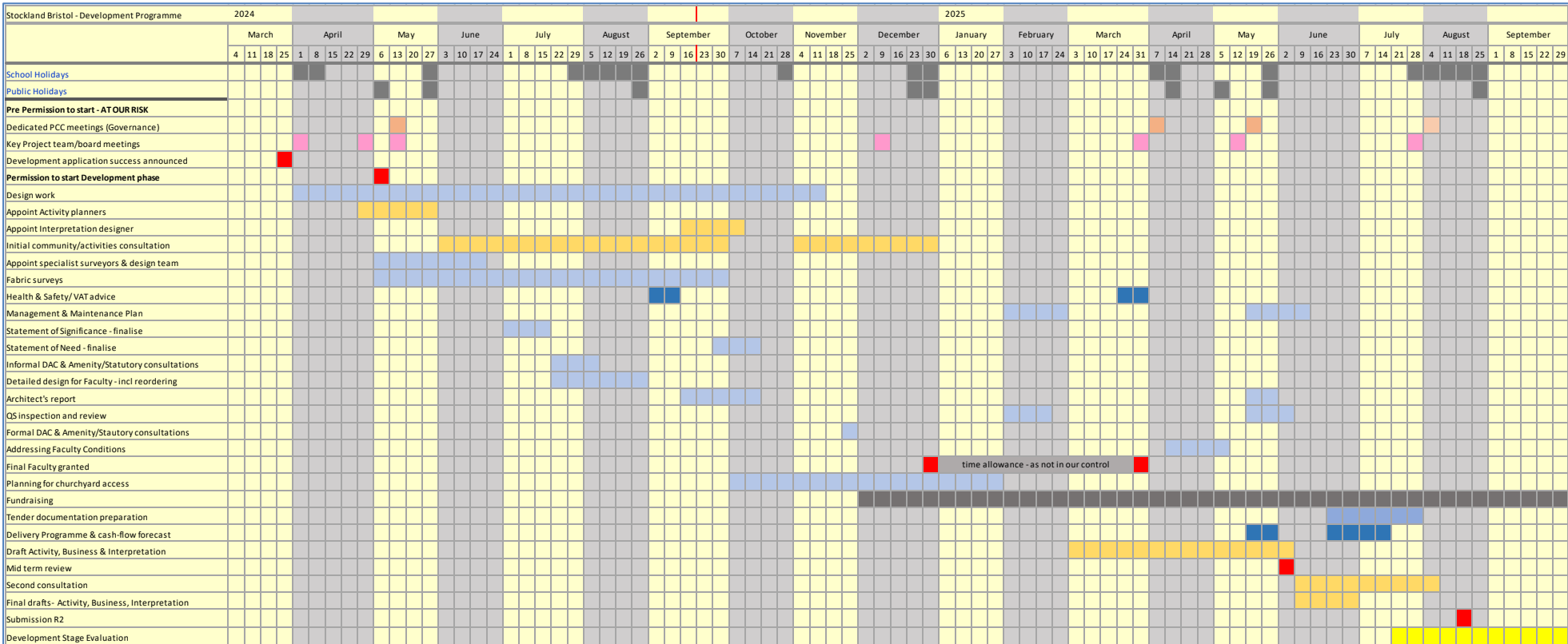
Again, to accommodate the bats, we aim to submit our delivery application for the August deadline in 2025.

We feel that our preparations for the project are in a good place to bring us to the point of our delivery application in ample time. Much of the two-years is set aside for achieving the match funding and to work up a complex, but feasible, activities programme engaging with multiple delivery partners and communities.

Other than Heritage Fund considerations, our development programme is affected by several external factors. These are mainly focussed on:

- The time required to achieve faculty;
- Programme for match-funding grants and foundations applications, meeting and decision dates, spending time requirements etc;
- The ebb and flow (and available resources) of (often small) partner organisations and community groups for our activity planning;
- Expiry time for repayment under the LPW VAT scheme;
- Critical path for delivery programme imperatives.

## Development Programme<sup>21</sup>



## Delivery programme

The production of our detailed delivery programme is to be a significant factor within the development project. Our current hope is to hear news of a favourable decision in December (subject to meeting dates in 2025) and achieve permission to start in February 2026.

In order to minimise risk of time running out on some of the match funding grant offers, the architect will confirm appointments and go to tender as early as possible. We have yet to decide whether to treat the conservation and adaptation (re-ordering) works as separate contracts. If we do, we aim to start the internal and reordering works by mid-June whilst the conservation (tower and bell-frame) tendering process is underway. We aim for the interior of the church to be up and running by November, with the tower works continuing independently whilst we are settling into the new facility. The two can be separated out quite neatly as there is no need for internal access to the church for the tower works, other than for the removal and reinstatement of the bells. During the period of reordering and fitting-out, temporary closures, whilst unavoidable, will be kept to the minimum and periodic public access and activities will be built into the contract phase.

The Activity Coordinator post will be advertised between hearing of our success and permission to start so that delivery-partner relationships can be re-kindled and the activities scheduled and finalised as soon as possible. The Interpretation Contractor will also be confirmed/recruited promptly with the aim to have the interpretation developed during the capital phase and installed right at the end of the building project, once the building is clean and ready. Our aim is to effect a soft opening to identify (and work thorough) snags and issues and prepare for full visiting and activities programme from the new year, which will continue through to project end in December 2028, with evaluation reports being completed by May 2027 (Capital-phase Interim report) and April 2029 (Final Report).

We will appoint our evaluation consultant early in the delivery project so that our capital phase can be evaluated whilst the contractors and consultants are still engaged, and our activities programme can benefit from formative as well as summative interpretation. We plan to evaluate our development project in-house as we have the experience within the team.

Many factors will affect the delivery programme, including cash flow and the timing of partnership grants. All these are on our radar and all currently-identified risks are being regularly considered and reviewed.



*Also, in A3 format in Appx 5*

## CAPITAL COSTS

### Development:

The total costs of undertaking the work needed to develop our project to round two HF application is calculated at £ 262,388. We are asking for a Development Grant of £199,655 (76%).

With the exception of the Listed Places of Worship VAT scheme, our match funding for this phase comes from our volunteer contribution and non-cash donation, this reflects that we have applied successfully for grants from HPC Community Fund for developing the project for both our Expression of Interest and our development applications – and will be applying to them for a major grant for the delivery.

All our consultancy estimates are based on considered advice from our current professional team. Fees for the main design team are built on the percentage of each discipline's contribution to bring the scheme to RIBA 3 & tender, taken from their whole-project percentage fee. Other reports, surveys and consultations are carefully costed at a fixed fee.

Although we have recently recruited our project architect, the rest of our professional team will need to be competitively tendered under NLHF guidance, before we can focus on project development. As our development period has been protracted to accommodate faculty and fundraising, we do not see this as a risk.

The financial focus of our development of the capital works is to achieve cost certainty, to mitigate risk and to ensure that we can deliver everything that we promise.

During this period, we will also compile our Activity Plan to deliver heritage-based engagement activities with new and targeted audiences as described above and, in our application, as well as to our community and visitors. We will consult with planned delivery partner organisations, individuals and prospective end-users to ensure that what we plan is wanted, useful, relevant and within our organisational capacity to deliver. Following further consultation (to reflect our enlarged advisory net around themes and media), our draft interpretation scheme will be tested to ensure it meets expectations and the final design will be honed, costed and embedded in the management and maintenance plan to ensure refreshment when needed. We are hiring a touchscreen for the development phase to use for community (and visitor) consultation and to test interpretive themes and designs.

For our operational business planning, capacity is likely to be a factor. As we consult, the opportunities currently appear endless and, whilst we are working to establish sustainable delivery partnerships for key activities, we must acknowledge that, in a community of this size, voluntary capacity is finite. Our post-project activities will be developed during the delivery phase to ensure that they perpetuate and remain relevant to the needs, aspirations and interests of the community as it develops.

### Matters still under consideration for the development project:

Whilst most of the main thrusts of the project are now decided, there are a few that require deeper thought during the development period:

- **Heating:** The decision has been reached that we will warm the occupants, not the building. Just in case the project delivery demonstrates more intense use of the building than we currently estimate, we will install pipes for underfloor heating under the new floor in the north aisle. However, these will terminate in the vestry cupboard and will be able to be connected to an air-source heating unit without costly retro-fitting if and when it is considered viable/desirable to do so;

We have a potential issue in that the electricity supply to the village is teetering. We have included a £20,000 provisional (delivery) sum in case we need to upgrade the supply to service the radiant heating, but our hope is that this will not be needed. We will commission a survey keep the Heritage Fund appraised of progress during the development phase;

- **Photovoltaic panels:** We will have the roofs tested at development stage to assess the viability of PVs. We are conscious that the south slope of the north aisle roof spends much time shaded by the tower, even during the summer. To clad the south slope of the nave with panels will have a significant aesthetic effect on the church and we need to consult the community and amenity groups further before we are able to make that decision. Depending on the results of our consultations and analysis of its likely cost-effectiveness, we will make our decisions during the development phase;
- **Sewage & drainage:** We are looking at various options. Preferred at this stage is the 'Trench Arch' system which is unobtrusive, off-grid, needs no regular maintenance and is free of any operational energy requirement. Our recent archaeological investigations make a strong recommendation for its location in the churchyard. If it should end up being located in our neighbour's field, we need to involve her closely in the process. Her stipulation is that the chosen system is as environmentally-friendly as possible and this system would satisfy this requirement. However, this is a relatively new system and, whilst increasingly used for churches in the Diocese of Bath & Wells, will need to satisfy community members, planners, Wessex Water and WWT to go ahead. A more proven technology is the 'Aquatron' system which has similar environmental performance as the trench arch system, but would require more work in the boiler house (bats), is double the cost to install and requires more extensive archaeological disruption;
- **Power-use and metering:** We have been looking at harnessing technology currently used at petrol stations whereby users can insert their personal or organisation's debit/credit cards to activate the electricity supply, thereby paying for what they consume (plus a maintenance and facility uplift). This has many benefits in avoiding waste and costs/resources incurred with booking and billing systems. However, it requires a reliable and serviceable broadband connection;
- **Broadband:** Despite a decade of promises, the village broadband remains risible (not even able to sustain live-streaming or contactless donations). During the development phase we will use this project as a lever to lobby Airband (the Council-appointed) provider and elected members to prioritise our village.

Currently, the Airband timetable shows our broadband is to be installed in 2024, but we have been here before. As this is also a vital element in enabling digital donations; an alternative is the satellite-based Skyband provider. We are not in a position currently to know how much either will cost.

- **The theatre piece:** We have reduced the budget (£30,000 allocated at EoI) to £15,000. Costs appeared to be escalating for this activity to the stage that it was showing poor value for money. At the same time, increasingly interesting ideas were coming forward for interpretation, digital outputs and a smaller performance project, which we feel will give a deeper, more engaging and longer-lasting return on investment. We will be talking to East Harptree, who have engaged with the Natural Theatre Company in Bath for a piece budgeted at £7,000, which will take place during our development period. Several others have suggested procurement models that will result in an interesting and fulfilling performance activity.



*The north aisle, set to become our community area*

## Development stage cash flow

| Stockland Bristol - Development Cashflow  |        |       |        |       |         |       |         |       |        |       |        |       |          |         |                                       |
|-------------------------------------------|--------|-------|--------|-------|---------|-------|---------|-------|--------|-------|--------|-------|----------|---------|---------------------------------------|
| NB: CONTINGENCIES NOT INCLUDED            | Q2     | VAT   | Q3     | VAT   | Q4      | VAT   | 2025 Q1 | VAT   | Q2     | VAT   | Q3     | VAT   | Clear-up | TOTALS  | NOTES                                 |
| INCOME                                    |        |       |        |       |         |       |         |       |        |       |        |       |          |         |                                       |
| PCC Contribution                          |        |       |        |       |         |       |         |       |        |       |        |       |          | -       |                                       |
| VAT Reclaim                               | -      |       | 2,758  |       | 13,929  |       | 5,159   |       | 2,998  |       | 2,998  |       | 6,002    | 33,843  |                                       |
| NLHF                                      | 91,376 |       |        |       | 91,375  |       |         |       |        |       |        |       |          | 182,751 | This HF Contribution less contingency |
| Other receipts                            | 300    |       |        |       | 200     |       | 200     |       |        |       | 300    |       |          | 1,000   |                                       |
| Income Total                              | 91,676 |       | 2,758  |       | 105,504 |       | 5,359   | -     | 2,998  | -     | 3,298  | -     | 6,002    | 217,594 | -                                     |
| EXPENDITURE                               |        |       |        |       |         |       |         |       |        |       |        |       |          |         |                                       |
| Recruitment Costs                         | 300    |       |        |       |         |       |         |       |        |       |        |       |          | 300     |                                       |
| Architect                                 | 13,788 | 2,758 | 13,788 | 2,758 | 13,788  | 2,758 | 13,788  | 2,758 | 13,788 | 2,758 | 13,788 | 2,758 |          | 82,728  |                                       |
| QS                                        |        | -     | 16,222 | 3,244 |         | -     |         | -     |        | -     | 16,222 | 3,244 |          | 32,444  |                                       |
| Structural Engineer                       |        | -     | 21,629 | 4,326 |         | -     |         | -     |        | -     |        | -     |          | 21,629  |                                       |
| M&E                                       |        | -     | 5,400  | 1,080 | 5,400   | 1,080 |         | -     |        | -     |        | -     |          | 10,800  |                                       |
| Measured Survey                           |        | -     | 6,000  | 1,200 |         | -     |         | -     |        | -     |        | -     |          | 6,000   |                                       |
| Small surveys (incl building control etc) |        | -     | 5,407  | 1,081 | 5,407   | 1,081 |         | -     |        | -     |        | -     |          | 10,814  |                                       |
| Ecology survey                            |        | -     | 1,200  | 240   | 1,200   | 240   | 1,200   | 240   | 1,200  | 240   |        | -     |          | 4,800   |                                       |
| Activity Plan                             |        | -     |        | -     |         |       | 9,000   |       |        | -     | 9,000  |       |          | 18,000  | VAT below here not recoverable        |
| Interpretation Plan                       |        | -     |        | -     |         | -     | 4,620   |       |        | -     | 4,620  |       |          | 9,240   |                                       |
| TTEA Advice                               | 1,200  |       | 1,200  |       | 1,200   |       | 1,200   |       | 1,200  |       | 1,200  |       |          | 7,200   |                                       |
| Consultation touchscreen                  | 3,000  |       |        | -     |         | -     |         | -     | 3,000  |       |        | -     |          | 6,000   |                                       |
| Travel & Printing                         |        | -     | 1,200  |       |         | -     | 1,200   |       |        | -     |        | -     |          | 2,400   |                                       |
| Consultation open day & taster costs      |        | -     | 150    |       |         | -     |         | -     | 650    |       |        | -     |          | 800     |                                       |
| Fit For The Future subs                   | 180    |       |        |       |         |       |         |       |        | -     | 180    |       |          | 360     |                                       |
| Volunteer travel                          |        | -     | 120    |       | 120     |       | 120     |       |        | -     |        | -     |          | 360     |                                       |
| Recoverable VAT                           | 2,758  |       | 13,929 |       | 5,159   |       | 2,998   |       | 2,998  |       | 6,002  |       |          | 33,843  |                                       |
| Expenditure Total                         | 18,468 |       | 72,316 |       | 27,115  |       | 31,128  |       | 19,838 |       | 45,010 |       | -        | 213,875 | -                                     |
| Quarterly Total                           | 73,208 | -     | 69,558 |       | 78,389  |       | 25,769  | -     | 16,840 |       | 41,712 |       | 6,002    |         |                                       |
| CASH FLOW                                 | 73,208 |       | 3,650  |       | 82,039  |       | 56,270  | -     | 39,429 | -     | 2,283  | -     | 3,719    | 3,719   | -                                     |

The cash flow does not show contingency drawdown and shows £182,751 coming from NLHF to reflect that. This table demonstrates that with £91,375 (50%) HF drawdown at Permission to Start and a further £91,375 at Quarter 4 in 2024, the development project will remain solvent. We are budgeting for 100% recoverable VAT for the contract elements of the development work as our understanding from the published guidance is that all our proposed work is eligible for recovery under the terms of the scheme. We show quarterly reclaim. VAT recovery is more complex for delivery and we are proposing that we seek VAT reclaim advice during the project development stage. This (and all) charts are included in the project spreadsheet appended to our application.

Although we are highly aware that this is a somewhat artificial picture in that it assumes absolutely prompt invoicing and administration for all parties, we are confident that it shows that we should not expect any cashflow issues during the Development Project. We will work closely with all contractors and consultants to ensure prompt invoicing and administration; we will also liaise closely with HF monitors, should contingency issues come to the fore.

For fees calculations for our professional and design teams and other surveys, please see below.

At delivery, with our extensive professional experience within our project team, especially Tom Wright's being a project building surveyor, we are confident that the project is comfortably within our capacity to bring in on time and on budget. At the development stage (and whilst talking to potential match-funders), we will pay particular attention to mitigating potential delivery-stage cash-flow issues to ensure there is no interruption further down the line. We will focus on our administration systems to ensure that all drawdown requests are handled efficiently and promptly; we have identified potential risks and explored mitigation to minimise both likelihood and implication of those risks. We are constantly wary about making predictions around future implications of Brexit and the international geo-political situation, but we consider that our development activity is unlikely to be de-railed and things will be clearer when we are looking at the position for our delivery stage.

### Contingency

We will endeavour to eliminate as much cost-uncertainty as possible during the development stage, but in the meantime, we are working on 7.5% contingency on building matters, including expenses such as prelims. We are also including 10% contingency on ex-contract items: whilst new work, white goods and equipment are traditionally seen as being less susceptible to unforeseen price increases than works to historic fabric, recent supply and inflation issues belie this assumption. For the activities and non-capital costs we have also included 10% contingency, but we will adjust our final activities around the available resources and if necessary, cut our cloth.

### Inflation

We are currently working on 2023 figures, uplifting on a 5.16% year-on-year inflation rate (QS advice). We are confident that we do not need at this stage to allow additional inflation on top of the current calculation (plus the contingency) in our current budgets.

## Fees

Fee rates, other than that of the architect and others aligned to the contract sum (which are now agreed and fixed for the duration of the project) have been worked up by Marcus Chantrey and Ian Walker, our QS. Having compared them to fee rates for similar projects they are reasonable and reflect the level of expertise we expect from our design team. Only the Architect, QS Structural Engineer, Activity, Interpretation and TTEA Advisor fees for the development phase exceed £5,000 and briefs for all these roles (bar the design team) are in APPX 1. The work of some consultants will span development and delivery phases. These have been budgeted as a lump sum and then apportioned across development and delivery stages according to the expected input either side of starting work on site.

Following discussion with Cassie Griffiths, the Business and Management and Maintenance Plans will be undertaken by John McVerry and the £10,500 combined fee is accounted as a gift-in-kind (non-cash contribution). The brief for the business planning is included with this application, although there is no associated cost to the Heritage Fund. They are delineated in blue opposite.

Our project (and inspecting) architect was (in anticipation of this application) recruited to NLHF procurement standards.

We have had the good fortune to be advised throughout by QS Ian Walker (Ian Walker Associates). Ian generously updated our 2019 figures for our 2022 Expression of Interest *pro bono* and has been on-hand throughout. Ian acted as QS for the West Huntspill project and provided an invaluable service linking Architect, contractor and client. Ian has a deep understanding of the issues arising around repairs to blue lias structures and knows local contractors well. We hope to continue working with him for the duration of the project.

All other consultants/contractors are to be recruited following our achieving permission to start.

| Description                      | Cost   | VAT    | Contingency | TOTAL  |
|----------------------------------|--------|--------|-------------|--------|
| Architect                        | 68,942 | 13,788 | 8,273       | 91,003 |
| Structural Engineer              | 18,024 | 3,605  | 2,163       | 23,792 |
| QS                               | 27,036 | 5,407  | 3,244       | 35,688 |
| M&E                              | 9,000  | 1,800  | 1,080       | 11,880 |
| Ecology Survey                   | 4,000  | 800    | 480         | 5,280  |
| Travel & Printing                | 2,000  | 400    | 240         | 2,640  |
| Measured Survey (church & tower) | 5,000  | 1,000  | 600         | 6,600  |
| Small surveys (0.5%) contract:   | 9,012  | 1,802  | 1,081       | 11,896 |
| VAT Advice                       |        | -      | -           | -      |
| Electrical supply survey         |        | -      | -           | -      |
| Petrological survey              |        | -      | -           | -      |
| Mortar analysis                  |        | -      | -           | -      |
| Faculty and Planning             |        | -      | -           | -      |
| Building Control                 |        | -      | -           | -      |
| Asbestos D&R survey              |        | -      | -           | -      |
| H&S Tree survey for access       |        | -      | -           | -      |
| Activity Planners                | 15,000 | 3,000  | 1,800       | 19,800 |
| Business Planners                | 10,000 |        | 1,000       | 11,000 |
| Advice on addressing slavery     | 6,000  | 1,200  | 720         | 7,920  |
| Interpretation design            | 7,700  | 1,540  | 924         | 10,164 |
| Management & Maintenance plan    | 500    |        |             | 500    |



### Development Volunteer and non-cash contribution:

We have estimated our volunteer input as consisting 3 governance meetings (additional to usual PCC meetings): at permission to start, Mid-term draft and final draft stages. This is, of course minimal as the project will also form part of all the regular sessions. We aim to bring the project team together (in-person and on-line) regularly, but with specific formal meetings bi-monthly (as average). We are estimating an average of 1 day per week project management for the 18 months of the development project. In addition, but not appearing on the budgets, we will be evaluating our development project as well as conducting our access, fire and other areas of work for which we are qualified.

| Volunteer contribution - Development |        |             |             |      |        |
|--------------------------------------|--------|-------------|-------------|------|--------|
|                                      | people | occasions   | Total hours | rate | TOTAL  |
| Project Governance                   | 8      | 3 x 2 hours | 48          | 20   | 960    |
| Project team meetings                | 6      | 9 x 3 hours | 162         | 20   | 3,240  |
| Project Management                   | 1      | 18 x 4 days | 576         | 20   | 11,520 |
|                                      |        |             |             |      |        |
|                                      |        |             |             |      | 15,720 |

In agreement with Cassie Griffiths, we are planning to undertake the Business Plan and the Management and Maintenance Plan in-house as it falls well within the skills-set of the project team. These pieces of work are included in the budgets, but off-set as non-cash contributions.

### DELIVERY:

#### Delivery Stage Capital costs

Currently our figures are running at £ 2,460,980 including £401,760 unrecoverable VAT. Our prudent (current) contingency however puts an additional £ 218,630 on to the bottom line. We could bring our headline figure down further by adjusting the volunteer contribution, but at this stage of development we think it better to leave as it is.

During the development stage our exploratory work and reports will give us even more cost-certainty than we currently have and our architect and QS will be rigorous in interrogating costs to iron out the 'reasonable estimates on the generous side' numbers that appear in any project at this stage. Our design team will be made aware that every additional project cost has to be up-lifted to include VAT, contingency, fees + inflation formulae.

The activities shown here have been developed with potential delivery partners and costed carefully with the advice of Ruth Gofton of Heritage and Community. Given the fragility of social provision and funding, there is a risk that not all the selected agencies will survive to the point of delivering. With that in mind, relationships will be further developed in the next stage and, should agencies be lost, we will ensure that replacement activities are devised to benefit the same audiences and address the same objectives.

Our procurement policy for delivery will be to use materials (and purchase plant) which is proven, efficient and able to be operated by amateurs/volunteers. Our equipment and kitchen white goods will be energy-efficient, simple to operate and easy to maintain and replace; our interpretation will be easy to clean and low cost to run; light bulbs will be easy to change and any introduced items will not require intricate (and expensive) maintenance

| <b>CONTRACT BREAKDOWN</b>                                 | £       | £                | LPGW             |
|-----------------------------------------------------------|---------|------------------|------------------|
| Investigative works                                       | 6,500   |                  |                  |
| Scaffolding & Temporary roofs                             | 80,600  |                  | 80,600           |
| Low level roofs                                           | 81,300  |                  | 81,300           |
| External walls                                            | 231,000 |                  | 231,000          |
| Windows                                                   | 32,200  |                  | 32,200           |
| External doors                                            | 23,300  |                  | 23,300           |
| Tower                                                     | 263,600 |                  | 261,100          |
| Bells                                                     | 77,200  |                  | 77,200           |
| Internal repairs                                          | 100,300 |                  | 100,300          |
| External works                                            | 15,500  | 911,500          | 15,000           |
| <b>reordering</b>                                         |         |                  |                  |
| Internal works                                            | 326,800 |                  | 191,700          |
| External works & drainage                                 | 92,400  | 419,200          | 57,400           |
| <b>sub total</b>                                          |         | <b>1,330,700</b> | <b>1,151,100</b> |
| Risk contingency (from QS risk schedule)                  | 199,600 |                  | 172,700          |
| <b>sub total including risk</b>                           |         | <b>1,530,300</b> | <b>1,323,800</b> |
| Preliminaries                                             | 12%     | 183,600          | 158,800          |
| <b>sub total at current prices</b>                        |         | <b>1,713,900</b> | <b>1,482,600</b> |
| Inflation - 5.16%                                         |         |                  |                  |
| Base date Q3 2023                                         |         |                  |                  |
| Tender date Q2 2025                                       |         | 88,500           | 76,600           |
| <b>Estimated CONTRACT SUM</b>                             |         | <b>1,802,400</b> | <b>1,559,200</b> |
| Professional Fees                                         | 17%     | 299,900          | 259,400          |
| <b>Estimated cost including fees</b>                      |         | <b>2,102,300</b> | <b>1,818,600</b> |
| VAT (on total - work & fees))                             | 20%     | 420,500          |                  |
| (on work not recoverable through LPGW)                    |         | 363,700          |                  |
| Professional fees on non-eligible works                   |         | 51,900           |                  |
|                                                           |         |                  | 415,600          |
| <b>TOTAL CONTRACT SUM INCL FEES AND UNRECOVERABLE VAT</b> |         |                  | <b>2,167,100</b> |

| EX CONTRACT                    |                |
|--------------------------------|----------------|
| Equipment & Furniture          | 13,400         |
| Activities incl interpretation | 143,950        |
| Conservation - photographs     | 2,500          |
| Conservation - brass plaque    | 650            |
| Hearing Loop                   | 5,000          |
| Contactless Terminal           | 300            |
| Broadband installation         | 500            |
| Café Equipment                 | 1,000          |
| IT equipment                   | 3,000          |
| Re-surface carpark             | 20,000         |
| Contingency ex contract 10%    | 19,030         |
| Inflation ex contract 10%      | 19,030         |
| VAT 20% ex contract            | 38,060         |
| Vounteer Contribution          | 39,480         |
| <b>TOTAL - Ex contract</b>     | <b>305,900</b> |

| ACTIVITIES - Total included in ex-contract |                                                 |  |  |
|--------------------------------------------|-------------------------------------------------|--|--|
| 52,650                                     | 3-day Activity co-ordinator x 3 years           |  |  |
| 2,800                                      | Activity expenses (power & travel) x 3 years    |  |  |
| 1,600                                      | Publicity                                       |  |  |
| 600                                        | Volunteer training                              |  |  |
| 1,600                                      | Volunteer expenses & refreshments               |  |  |
| 8,500                                      | Digital outputs                                 |  |  |
|                                            | 500 Photography project                         |  |  |
|                                            | 3,000 Web design                                |  |  |
|                                            | 600 Oral archives                               |  |  |
|                                            | 2,000 TTEA Curriculum resources                 |  |  |
|                                            | 2,400 Bat monitors & link                       |  |  |
| 2,000                                      | Biodiversity activities                         |  |  |
| 4,000                                      | Schools programme                               |  |  |
| 200                                        | Schools resources                               |  |  |
| 1,000                                      | Intergenerational activities                    |  |  |
| 8,000                                      | TTEA activities                                 |  |  |
| 5,000                                      | List of enslaved Africans - Daniel compensation |  |  |
| 15,000                                     | Performance art                                 |  |  |
| 102,950                                    | sub total                                       |  |  |
| 22,000                                     | Interpretation designer                         |  |  |
| 7,000                                      | Interpretation materials                        |  |  |
| 12,000                                     | Evaluation Report                               |  |  |
| <b>143,950</b>                             |                                                 |  |  |

contracts to keep going. We aim that nothing that we put in will be obsolete within a decade with the likely exception of computer equipment, which depreciation over 5 years will be addressed in the Management and Maintenance calculations.

To use our funds efficiently, our contract commitment for white goods and equipment will finish 'at the plug'. This will enable us to purchase appropriately spec'd items without incurring additional fees etc in respect of the procurement. The furniture for the north aisle will be procured by the client as we have the knowledge and ability to do so within our resource. We will also commission the conservation of the photographs and enamel plaque outside the contract sum.

The fees allocation for the main protagonists at delivery phase is on percentage-of-contract basis, less the proportion already paid at development. The remaining 50% of the 1% contract sum for minor surveys is considered adequate to meet all our needs. Fees for non-contract elements of the project are accounted-for within the activities' budgets.

#### Delivery Stage Contingency & Inflation

We will endeavour to eliminate as much cost-uncertainty as possible during the development stage, but in the meantime, we are working on 7.5% risk contingency on building matters (including expenses such as prelims) in consideration of the explorations that we are undertaking at Development Stage. A 10% on ex-contract items (white goods and equipment etc) is to reflect that, although usually seen as being less susceptible to unforeseen price increases than works to historic fabric, current supply issues and inflation are causing prices of some things to rise sharply. For the activities and non-capital costs we also have (currently) included 10% contingency and we will adjust our final activities around the available resources and if necessary, cut our cloth. We will keep a close eye on this during the development period as some activity-related costs are rising (school's transport, partner/contractor costs (especially travel and interpretation materials and plant). We are aware that consultants/activity contractors are at the limit of what they can continue to absorb without raising their fees.

| St Mary Magdalene, Stockland Bristol |           |         | FEES        |         |          |         |
|--------------------------------------|-----------|---------|-------------|---------|----------|---------|
| Fees                                 | Total     |         | Development |         | Delivery |         |
|                                      | %         | £       | %           | £       | %        | £       |
| Architect                            | 8.5%      | 153,204 | 45%         | 68,942  | 55%      | 84,262  |
| Structural engineer                  | 2.0%      | 36,048  | 50%         | 18,024  | 50%      | 18,024  |
| QS                                   | 3.0%      | 54,072  | 50%         | 27,036  | 50%      | 27,036  |
| CDM                                  | 0.5%      | 9,012   | 50%         | 4,506   | 50%      | 4,506   |
| M&E 9% M&E services                  |           | 18,000  | 50%         | 9,000   | 50%      | 9,000   |
| Ecology                              | lump      | 8,000   | 50%         | 4,000   | 50%      | 4,000   |
| Archaeologist                        | lump      | 3,000   |             | 0       | 100%     | 3,000   |
| M & M                                | lump      | 500     | 100%        | 500     |          | 0       |
| Asbestos d & r                       | lump      | 500     | 100%        | 500     |          | 0       |
| Travel & Printing                    | lump      | 4,000   | 50%         | 2,000   | 50%      | 2,000   |
| Other                                | 1.0%      | 18,024  | 50%         | 9,012   | 50%      | 9,012   |
| Design team Total                    |           | 304,360 |             | 143,520 |          | 160,840 |
| Activities                           | lump      | 15,000  | 100%        | 15,000  |          | 0       |
| Business                             | lump      | 10,000  | 100%        | 10,000  |          | 0       |
| Interpretation                       | lump      | 22,000  | 35%         | 7,700   | 65%      | 14,300  |
|                                      |           |         |             |         |          |         |
| TOTALS                               |           | 351,360 |             | 176,220 |          | 175,140 |
|                                      |           |         |             |         |          |         |
| Contract sum                         | 1,802,400 |         |             |         |          |         |

It is not considered feasible in the current financial climate to go to tender during the Development project as contractors are unwilling to commit beyond three months in the current economic climate. However, during the development phase we will research potential contractors and work up a list of companies to be invited to tender. Our intention is to spend our grant locally if possible and Somerset is well provided with excellent companies of sufficient size and experience to undertake this project. Again, we will discuss this with East Harptree, West Huntspill and St John's Glastonbury.

### Delivery Stage income:

We have done significant work to identify potential match funding. We have secured two HPC Community Fund grants to fund the work up to this stage.

We have a carefully worked-out fundraising strategy (APPX 2) and (where possible) have had informal conversations organisations that we see as potentially significant investors in our project. We always knew (and it has been confirmed) that we are too early in the process for most grant bodies to consider an approach and our formal applications to them will be carefully timed to meet our HF programme and our cash-flow requirements at the delivery stage.

By the time our application for delivery is submitted, we will have as clear a commitment as possible from all our match-funding bodies. We will also have refined the contingency and inflation figures, which will give us far greater cost-certainty as a focus for our fundraising.

We see the main threats to our match funding as being:

- Loss of the LPW VAT recovery scheme;
- Our failing to attract sufficient funds. *In mitigation*, we have obtained the fundraising strategies for several similar Somerset projects as well as studying current relevant funding schemes. If successful in this development application, we will visit several other projects to pick their brains and learn from their advice. We aim to undertake the design and development work as soon as possible in the development phase so that (faculty granted) we can then focus on fundraising and developing our activities and interpretation. Gary Watson, the Diocese's Grants Officer has also looked through our Funding Strategy;
- An overly protracted Faculty process delaying our fundraising. *In mitigation*, we have already put our plans to the Diocesan Advisory Committee (DAC) and have secured reassurance that they are satisfied with our fundamental reordering proposals of screening, pew removal, kitchenette and the scale and position of the wc - to the extent that they will recommend our scheme to the amenity societies and Chancellor (under the rules of Ecclesiastical Planning Exemption), subject to getting the detail right. The detailed plans, proposals and faculty applications will be undertaken early in the development phase, but

| Income           | Dev't   | Delivery  |
|------------------|---------|-----------|
| LPW - VAT        | 35,463  | 415,600   |
| Large Grants     |         | 233,500   |
| Small Grants     |         | 18,700    |
| Community        | 1,000   | 5,000     |
| Non-cash Contrib | 10,500  |           |
| Volunteer Cont   | 15,720  | 39,480    |
| sub total        | 62,683  | 712,280   |
| NLHF             | 199,655 | 1,962,120 |
| NLHF %           | 76      | 73        |

we are assured that there are no key ‘show-stoppers’. Following DAC advice, we will be submitting a series of faculty applications to ensure that the whole project doesn’t get held up on the strength of one issue.

As we have been formulating our plans during the transition period for the new Somerset Council, we have not yet made any overtures to the planning department regarding the creation of no-step access from the road to the churchyard. However, a scheme was devised a few years ago and we will be revisiting that during the development stage. We are not anticipating any significant issues with this – and it is the only aspect of our project requiring civil planning permission.

### Volunteer Contribution

As with the development project, our approach to assessing volunteer contribution at delivery has been modest as, whilst benefitting the proportion of our secured contribution (and therefore the percentage HF grant), the project total becomes distorted and can be alarming. We are totally confident that our partners and community will contribute what is needed to deliver the project successfully, regardless of what we might have committed to in our application.

At this stage, for delivery we are anticipating a monthly project team meeting during the capital phase and quarterly thereafter; quarterly governance meetings: at project start, the end of the capital phase and for evaluation; + one day per week project management. The Project Management (1 day per week throughout) will cover supervision of the Activities Coordinator, NLHF liaison and management of the Evaluation consultants. We are assuming that the input will be significantly more at the start of the project, but calculate that it will even out to about 1 day per week across the delivery stage. This calculation assumes that the architect will take on the direct management of the physical works, the activities co-ordinator of the activities and the interpretation installation will be largely overseen by the interpretation contractor. We also include 1 day per week for the treasurer during the capital phase and ½ pw thereafter. This comes from consulting other projects. We have not calculated the time of PCC subgroups, the Activity Group or external partners

| <b>VOLUNTEER CONTRIBUTION - Delivery</b>                        |        |                                            |             |      |        |  |
|-----------------------------------------------------------------|--------|--------------------------------------------|-------------|------|--------|--|
|                                                                 | People | Occasions                                  | Total hours | Rate | Total  |  |
| Project team Meetings                                           | 4      | Monthly yr 1,<br>1/4ly yrs 2-3<br>@2 hours | 192         | 20   | 3,840  |  |
| Governance                                                      | 6      | 1/4ly x 2 hrs                              | 144         | 20   | 2,880  |  |
| Project Management<br>(incl) managing activities<br>coordinator | 1      | 1 day pw<br>average for 3-<br>years        | 1092        | 20   | 21,840 |  |
| Treasurer                                                       |        | 1 day pw yr 1<br>and 1/2 day<br>pw yrs 2&3 | 546         | 20   | 10,920 |  |
|                                                                 |        |                                            |             |      | 39,480 |  |

and advisers – or of volunteers assisting with tours, activities or project functions, including the occasions when the building works are made available for public visiting.

A more precise schedule of meetings and their anticipated attendees will be worked up during our development stage.

## **FINANCIAL APPRAISAL - OPERATION**

The PCC's operating mission is to sustain the church building and perpetuate their intended use as places of Christian worship and whole-community wellbeing. This extends to our maintaining and interpreting the church as a heritage attraction and public facility (including Honesty Café) for both residents and visitors. Our business is to sustain our operation and make our organisation more resilient into the future. In the

| <b>SBM - OPERATING</b>       | 2017    | 2018  | 2019    | 2020  | 2021  | 2022  |
|------------------------------|---------|-------|---------|-------|-------|-------|
| INCOME                       |         |       |         | COVID |       |       |
| Gifts                        |         |       |         |       |       |       |
| Gift-Aided income            | 1,080   | 1,290 | 1,260   | 1,665 | 1,960 | 1,840 |
| Tax recovered                | 565     | 520   | 536     | 560   |       | 553   |
| Cash collections             | 1,458   | 1,936 | 1,411   | 985   | 1,289 | 1,350 |
| General Income               |         |       |         |       |       |       |
| Donations                    | 1,017   | 212   | 1025,46 | 141   | 530   | 2,458 |
| Grants (Parish Meeting)      | 163     |       | 1,814   |       |       | 550   |
| Fees                         | 772     | 1,204 | 721     | 1,152 | 660   | 331   |
| Fundraising                  | 563     | 652   | 999     | 120   | 582   | 2,327 |
| Investment income & interest |         |       |         |       |       |       |
| Central Board of Finance     | 300     | 307   | 330     | 324   | 335   | 271   |
| Bank Interest                | 1       | 5     | 8       | 1     |       | 2     |
| Other                        |         |       |         |       |       |       |
| Insurance Claim              |         | 847   |         |       |       |       |
| Transfers from Reserve a/c   |         |       | 6,142   |       |       |       |
| Income total                 | 5,919   | 6,973 | 13,220  | 4,948 | 5,356 | 9,682 |
| EXPENDITURE                  |         |       |         |       |       |       |
| Wider Church                 |         |       |         |       |       |       |
| Common Fund                  | 2,350   | 3,051 | 1,500   | 2,000 | 2,500 | 4,313 |
| Deanery Synod subscription   | 73      | 50    | 100     |       |       | 50    |
| Our Church                   |         |       |         |       |       |       |
| Ministry & Admin             | 602     | 416   | 225     | 934   | 84    | 455   |
| Upkeep of worship            | 38      |       | 20      |       |       | 12    |
| Building operation           | 1,860   | 2,329 | 2,072   | 1,714 | 1,588 | 1,588 |
| Building Maintenance         | 2,384   | 567   | 9,013   | 440   |       | 308   |
| Churchyard Maintenance       | 150     |       |         | 75    | 75    | 305   |
| Clock Maintenance            | 277     |       |         |       |       |       |
| Fundraising expenses         |         | 25    |         |       |       | 37    |
| Misc                         | 100     | 951   |         |       | 90    |       |
| Giving                       |         |       |         |       |       |       |
| Charitable bodies            | 170     | 161   | 150     | 70    | 70    | 375   |
| Expenditure total            | 8,004   | 7,550 | 13,080  | 5,233 | 4,407 | 7,443 |
| SURPLUS/DEFICIT              | - 2,085 | - 577 | 140     | - 285 | 949   | 2,239 |



shadow of Brexit and COVID, we will be rigorous in our budgeting and look carefully at a range of PESTLE<sup>22</sup> scenarios during the development stage.

This project will serve to give structure and definition to our endeavour by annualising the management and maintenance requirements for the church, including the maintenance/replacement of interpretation and other depreciating assets. Significantly too, our project will give us structure and experience to perpetuate and develop our community (and wider) contacts and co-produced targeted activities.

Ever mindful that the operating sums in question are relatively small and we are a volunteer-run not-for-profit organisation, the budgeting will balance our need to meet our obligations and commitments with the imperative that whilst remaining business-like in approach, involvement at all levels must be positive and enjoyable.

The operating appraisal will be built up during the development stage as currently we are missing key information which will come from the Management & Maintenance and Activity plans. All indicators are that we are confidently moving on a positive trajectory towards operational sustainability. Much work will be done as we develop our planning to examine our expenditure further and increase our income to sustain our activities and fabric needs beyond the project – and within our organisational capacity. There is strong evidence that the increased levels of interest are already paying off in terms of increased earned income and (slightly) increased giving.

A number of other factors will be brought into our analysis of operational potential. First, we will register as eco-church. This has not been possible up to now as so much is in the air around installation of services etc. We anticipate being assisted in this through our membership of Fit-for-the-Future.

## **RISK & MITIGATION**

Given the contextual events of our project so far, risk and its mitigation has been central to everything that we are planning. As stated at the top of this document, the main threats to our project are totally beyond our influence or control. With that said, we have embedded ourselves into our community, consulting with agencies and acquiring knowledge and analysis far beyond any currently available statistics. We are sure that, as far as is possible, we have identified all significant risks and mitigated them carefully. Our most significant mitigation is to extend our development period almost to 18 months to allow for any issues around faculty or fundraising.

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<sup>22</sup> Political, Economic, Social, Technological, Legal & Environmental risks

These risk tables (below) are included at A3 size as APPX 5 and as attachments to the application form. There is also the QS construction risk schedule (shown at 7.5%), which is shown below and included in the Order of Cost Estimate attached to the application.



*The church from the east + the bells and top of the gloriette tower*



| St Mary Magdalene, Stockland Bristol - Development risks |                    |                                                                                                                        | Key: Probability                                                                                               |             |        | Key: Impact                      |                                                                                                                                                                                                                                                                                                                                                        |                |
|----------------------------------------------------------|--------------------|------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|-------------|--------|----------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
|                                                          |                    |                                                                                                                        | 1 = highly unlikely                                                                                            |             |        | 1 = negligible impact to outcome |                                                                                                                                                                                                                                                                                                                                                        |                |
| Risk Register                                            |                    |                                                                                                                        | 2 = unlikely                                                                                                   |             |        | 2 = minor impact                 |                                                                                                                                                                                                                                                                                                                                                        |                |
|                                                          |                    |                                                                                                                        | 3 = possible                                                                                                   |             |        | 3 = of concern                   |                                                                                                                                                                                                                                                                                                                                                        |                |
|                                                          |                    |                                                                                                                        | 4 = probably                                                                                                   |             |        | 4 = must be addressed            |                                                                                                                                                                                                                                                                                                                                                        |                |
|                                                          |                    |                                                                                                                        | 5 = very likely                                                                                                |             |        | 5 = showstopper                  |                                                                                                                                                                                                                                                                                                                                                        |                |
| Ref                                                      | Area               | Risk                                                                                                                   | Impact                                                                                                         | Probability | Impact | Risk value                       | Mitigations                                                                                                                                                                                                                                                                                                                                            | Risk owner     |
|                                                          | Construction       | Conservation costs grow exponentially                                                                                  | Project becomes poor VFM for HF                                                                                | 3           | 4      | 12                               | Development funding has been included for detailed exploration of the tower masonry. Prior to R1, careful observation, QS and high % contingency were included. Additional Match-funding could be sought, but not desirable                                                                                                                            | PM Architect   |
|                                                          | Construction       | Situation is worse than we expect on opening-up, requiring further survey work                                         | Delays and cost                                                                                                | 2           | 4      | 8                                | Surveys have been undertaken already and knowledge of our church makes us confident. There is contingency in Dev stage if additional work is required                                                                                                                                                                                                  | Architect      |
|                                                          | Construction       | We fail to achieve Faculty                                                                                             | Delay and cost                                                                                                 | 2           | 4      | 8                                | We have secured in-principle support from the DAC for the major re-ordering points. HE is not anticipating difficulties and there is nothing currently contentious and no issues are expected. Detailed faculty and list B proposals will be worked up early in the development phase and we will enter multiple faculty applications to mitigate risk | Architect      |
|                                                          | Construction       | Scope creep: requirements increase as time progresses                                                                  | Costs rise, delays incurred etc                                                                                | 2           | 4      | 8                                | Capital building project and interpretation scoped and (we hope) finalised. Any additions will be outside the project unless they threaten the integrity of the proposals                                                                                                                                                                              | PM             |
|                                                          | Business plan      | Economic downturn ... exploration shows our current business projection to be over optimistic                          | Current business case assumptions prove incorrect                                                              | 3           | 3      | 9                                | Our current business plan is robust, conservative and will be stress-tested at development stage and reviewed at delivery. Business aspirations are modest in order to be achievable.                                                                                                                                                                  | PM             |
|                                                          | Professional team  | Contracting company becomes insolvent or lost through other reasons (Architect, Interpretation, business and activity) | All work on that element of the planning stops                                                                 | 3           | 4      | 12                               | Robust procurement process to include viability of company as criterion; smaller contracts can be re-let quickly.                                                                                                                                                                                                                                      | Architect & PM |
|                                                          | PCC & project team | Key team members fall ill, move away or have to resign                                                                 | Project loses direction and momentum                                                                           | 3           | 4      | 12                               | The team is lean, but backed-up and professionally supported; nothing rests solely in the lap of one person.                                                                                                                                                                                                                                           | PM             |
|                                                          | Resources/capacity | Internal resources insufficient to cope with project demands                                                           | Deadlines missed;; activity plan delayed, HF reporting delayed, funding draw down delayed information missing; | 3           | 4      | 12                               | Separation of tasks has been agreed by members that they can cope with demands; all critical processes have back-up; Advance planning when input required; all key players have undertaken to see the project through                                                                                                                                  | PM             |
|                                                          | Reputational       | Failure to submit delivery application                                                                                 | Loss of grant                                                                                                  | 1           | 5      | 5                                | Experienced team; good project management; realistically planned, timed and costed project                                                                                                                                                                                                                                                             | PM             |
|                                                          | Activity Plan      | Fail to attract sufficient potential delivery partners for specifically aimed activities                               | Project fails to hit HF and PCC strategic objectives                                                           | 1           | 4      | 4                                | We would spread our net further to find partners. All indications through consultation so far are that this will not                                                                                                                                                                                                                                   | PM             |
|                                                          | Activity Plan      | Fail to attract people for activities                                                                                  |                                                                                                                | 2           | 4      | 8                                | Each currently proposed activity has been worked up through consultation and co-created with a proposed delivery partner.                                                                                                                                                                                                                              | PM             |
|                                                          | Finance            | Change in Gov't policy loses VAT reclaim under Listed Places of Worship Scheme                                         | 20% rise in costs                                                                                              | 3           | 5      | 15                               | Unlikely during this project, but not in our control; will affect entire sector                                                                                                                                                                                                                                                                        | PM             |
|                                                          | Finance            | Over-run of development phase causes us to miss 12-month window to claim development VAT through LPW scheme            | 20% rise in costs                                                                                              | 3           | 4      | 12                               | Programme is a major focus for the delivery period                                                                                                                                                                                                                                                                                                     | PM             |
|                                                          | Finance            | We fail to secure match Funding                                                                                        | costs, delay and reputational damage                                                                           | 3           | 5      | 15                               | We have a realistic strategy and realistic targets. We are continuing to work on the fundraising and will continue throughout                                                                                                                                                                                                                          | SP             |
|                                                          | Political          | Election, or other event puts HF into purdah                                                                           | Development phase - and consequently entire project - is put back                                              | 4           | 4      | 16                               | Beyond our control, but action can be taken asap if possibility becomes likelihood                                                                                                                                                                                                                                                                     | PM             |

| St Mary Magdalene, Stockland Bristol - Delivery risk |                     |                                                                      |                                                                                                                                    |             |        |                                  |                                                                                                                                                                                                                                                           |                 |
|------------------------------------------------------|---------------------|----------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|-------------|--------|----------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|
| Risk Register                                        |                     |                                                                      | Key: Probability                                                                                                                   |             |        | Key: Impact                      |                                                                                                                                                                                                                                                           |                 |
|                                                      |                     |                                                                      | 1 = highly unlikely                                                                                                                |             |        | 1 = negligible impact to outcome |                                                                                                                                                                                                                                                           |                 |
|                                                      |                     |                                                                      | 2 = unlikely                                                                                                                       |             |        | 2 = minor impact                 |                                                                                                                                                                                                                                                           |                 |
|                                                      |                     |                                                                      | 3 = possible                                                                                                                       |             |        | 3 = of concern                   |                                                                                                                                                                                                                                                           |                 |
|                                                      |                     |                                                                      | 4 = probably                                                                                                                       |             |        | 4 = must be addressed            |                                                                                                                                                                                                                                                           |                 |
|                                                      |                     |                                                                      | 5 = very likely                                                                                                                    |             |        | 5 = showstopper                  |                                                                                                                                                                                                                                                           |                 |
| Ref                                                  | Area                | Risk                                                                 | Impact                                                                                                                             | Probability | Impact | Risk value                       | Mitigations                                                                                                                                                                                                                                               | Risk owner      |
|                                                      | Construction        | Conservation works encounter unforeseen difficulties                 | Conservation delayed and costs rise                                                                                                | 2           | 4      | 8                                | Work was done at development stage to ensure knowledge of the conservation requirements and to achieve cost certainty. Sufficient levels of contingency are included; Procurement of construction company with sufficient experience of similar projects; | PM<br>Architect |
|                                                      | Construction        | Situation is worse than we expect on opening up                      | Delays and cost                                                                                                                    | 2           | 4      | 8                                | Extensive surveys have been undertaken and knowledge of our church makes us confident.                                                                                                                                                                    | Architect       |
|                                                      | Construction        | Discover unknown archaeology                                         | Delay and cost                                                                                                                     | 2           | 5      | 10                               | As much pre-surveys as possible has already been done. There will be an archaeologist on-site                                                                                                                                                             | Architect       |
|                                                      | Cost                | Inflation is greater than predicted                                  | Costs rise and value engineering is required                                                                                       | 4           | 4      | 16                               | Our calculations have been thorough; we will monitor closely; prepare to VE on items that can be picked up later and are not critical to conservation or business plan; decent contingency;                                                               | PM<br>Architect |
|                                                      | Cost                | Economic downturn                                                    | Business case assumptions prove incorrect                                                                                          | 3           | 3      | 9                                | Ensure business plan is robust, conservative and will be stress-tested at development stage and reviewed at delivery                                                                                                                                      | PM              |
|                                                      | Cost                | Change in Gov't policy loses VAT exemption                           | 20% rise in costs                                                                                                                  | 2           | 5      | 10                               | Unlikely during this project, but not in our control; will affect entire sector                                                                                                                                                                           | PM              |
|                                                      | Design requirements | Scope creep: requirements increase as time progresses                | Costs rise, delays incurred etc                                                                                                    | 2           | 4      | 8                                | Capital building project and interpretation scoped and finalised. Any additions will be outside the project                                                                                                                                               | PM              |
|                                                      | Construction        | Contractor company becomes insolvent                                 | All work stops                                                                                                                     | 3           | 4      | 12                               | Robust procurement process to include viability of company as criterion; only robust companies have been invited to tender                                                                                                                                | Architect       |
|                                                      | Reputational        | Failure to deliver project                                           | Loss of grant                                                                                                                      | 1           | 5      | 5                                | Experienced team; good project management; realistically planned, timed and costed project                                                                                                                                                                | PM              |
|                                                      | Activity Plan       | Fail to attract activity planner of sufficient quality               | Delivery is dependant on the energy and ability of the activity co-ordinator                                                       | 2           | 4      | 8                                | The role has been carefully designed (and remunerated) to attract a decent range of applications. Team members are well connected with the sector. The geography of the project still leaves a vulnerability.                                             | PM              |
|                                                      | Activity Plan       | Fail to attract sufficient volunteers                                | Delivery is dependant on volunteer support                                                                                         | 3           | 4      | 12                               | We intend to spread our net further; we will recruit an activities co-ordinator who will focus on recruiting and training volunteers                                                                                                                      | PM              |
|                                                      | Activity Plan       | Proposed delivery partnerships fall through                          | Delivery is dependant on partnership delivery as community is too small and not sufficiently diverse to find audiences internally. | 2           | 4      | 8                                | We have linked with a range of strong and diverse locally connected organisations as prospective partners. There are others in reserve should a relationship (or partner organisation) fail                                                               | PM              |
|                                                      | Activity Plan       | Fail to attract people for activities                                | Fail to deliver our activity plan                                                                                                  | 2           | 4      | 8                                | Each activity has been worked up through consultation and co-created with a proposed delivery partner.                                                                                                                                                    | PM              |
|                                                      | Activity Plan       | We lose expected delivery partners through organisations closing etc | Weakens our achievements on our strategic objectives                                                                               | 2           | 4      | 8                                | Each activity has been worked up through consultation and co-created with a proposed delivery partner. We have a list of potential back-up delivery partners                                                                                              | PM              |
|                                                      | Activity Plan       | We fail to recruit and sustain the campanology group                 | Weakens our achievements on our strategic objectives                                                                               | 2           | 4      | 8                                | much work has been done on promoting the idea of ringing bells - convivial fitness and fun. We will recruit in earnest from the development stage and create programme to ensure retention                                                                | PM              |
|                                                      | Resources           | Internal resources insufficient to cope with project demands         | Deadlines missed; activity plan delayed, HLF reporting delayed, funding draw down delayed information missing;                     | 3           | 4      | 12                               | Separation of tasks has been agreed by members that they can cope with demands; all critical processes have back-up; Advance planning when input required; all key players have undertaken to see the project through                                     | PM              |
|                                                      | Political           | Election, or other event, puts HF into purdah                        | Permission to start - and consequently entire project - is put back. Loss of Dev't VAT reclaim                                     | 3           | 4      | 12                               | Beyond our control, but action can be taken asap if possibility becomes likelihood                                                                                                                                                                        | PM              |
|                                                      | Political           | Culture wars                                                         | Community gets caught up in vitriol and loses confidence                                                                           | 3           | 5      | 15                               | We are not planning wide social media presence and protocols will be drawn up to protect volunteers handling communications                                                                                                                               | PM              |

| St Mary Magdalene, Stockland Bristol - post delivery risks |                |                                                                                                                | Key: Probability                                                               |             |        | Key: Impact                      |                                                                                                                                                                                                                                                                                                                                                                                                      |            |
|------------------------------------------------------------|----------------|----------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------|-------------|--------|----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| Risk Register                                              |                |                                                                                                                | 1 = highly unlikely                                                            |             |        | 1 = negligible impact to outcome |                                                                                                                                                                                                                                                                                                                                                                                                      |            |
|                                                            |                |                                                                                                                | 2 = unlikely                                                                   |             |        | 2 = minor impact                 |                                                                                                                                                                                                                                                                                                                                                                                                      |            |
|                                                            |                |                                                                                                                | 3 = possible                                                                   |             |        | 3 = of concern                   |                                                                                                                                                                                                                                                                                                                                                                                                      |            |
|                                                            |                |                                                                                                                | 4 = probably                                                                   |             |        | 4 = must be addressed            |                                                                                                                                                                                                                                                                                                                                                                                                      |            |
|                                                            |                |                                                                                                                | 5 = very likely                                                                |             |        | 5 = showstopper                  |                                                                                                                                                                                                                                                                                                                                                                                                      |            |
| Ref                                                        | Area           | Risk                                                                                                           | Impact                                                                         | Probability | Impact | Risk value                       | Mitigations                                                                                                                                                                                                                                                                                                                                                                                          | Risk owner |
|                                                            | Financial      | Business case assumptions prove incorrect                                                                      | Revenue is not generated according to business case                            | 3           | 4      | 12                               | Ongoing review of assumptions<br>Timely modifications to budgets and forecasts if appropriate; Marketing strategy included in Business Plan; Business planning will continue to be realistic/conservative; proactive response to perceived changes                                                                                                                                                   | Treasurer  |
|                                                            | Sustainability | Almost immediately upon completion of this project another critical area of need is found                      | Unable to continue activities or generate income                               | 1           | 4      | 4                                | We are confident that we know about our likely needs and will be embarked on phase 2 before the end of this project. Management & maintenance needs are embedded in the business plan and the next critical repairs are already known. The next project (the roof) will already be in train before the end of the project, with activities to build on (and embellish) the successes of the project. | PCC        |
|                                                            | Sustainability | We fail to attract and retain sufficient volunteers                                                            | It becomes impossible to open the church and run activities                    | 2           | 5      | 10                               | All incomers to the village will be inducted to the project and every effort will be made from the start to ensure succession and participation                                                                                                                                                                                                                                                      | PCC        |
|                                                            | Reputational   | The end result of project fails to live up to expectations - visitor and concert numbers (and income) declines | Loss of confidence;<br>Loss of support from Patrons, Friends, congregation etc | 2           | 4      | 8                                | Our business plan addresses the most vulnerable elements of our operation                                                                                                                                                                                                                                                                                                                            | PCC        |
|                                                            | Governance     | Interest wanes as people's connection with religious practice declines                                         | Membership and volunteer numbers decline                                       | 3           | 5      | 15                               | The aim of the project is to reinforce and formalise that the church is a community asset, owned by and run by community members regardless of their religious practices or affiliations                                                                                                                                                                                                             | PCC        |
|                                                            | Resources      | Internal resources insufficient to cope with project demands                                                   | We become unable to continue the activity programme beyond the project         | 3           | 4      | 12                               | Engaging with delivery partners will keep momentum and key initiatives going; and succession planning for PCC will embrace the need for heritage and visitor experience/skills.                                                                                                                                                                                                                      | PCC        |



## ORDER OF COST ESTIMATE

St Mary Magdalene, Stockland Bristol

### COST RISK SCHEDULE

| Ref                         | Risk Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Impact | Risk Level | Control Method                                                                                                                                                                                                                                                                                                                    | Target Risk Level | Risk Allowance |              |                |
|-----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|----------------|--------------|----------------|
|                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |        |            |                                                                                                                                                                                                                                                                                                                                   |                   | Quantity       | Rate (£)     | Risk Allowance |
|                             | <b>Design development risks</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |        |            |                                                                                                                                                                                                                                                                                                                                   |                   |                |              |                |
|                             | The estimate for repairs is based on the interpretation of a condition report (which describes defects) and not a schedule of works (which identifies the extent and type of repair work required). In some instances the likely nature and extent of repair can be relatively easily defined from the description of the defect but in others, interpretation is required. There is a risk that the interpretation will be inaccurate. Particular issues where there is interpretation risk include: |        |            | The estimate generally takes a position erring towards 'worst case scenario' and this will limit the risk of cost increase. The estimate and cost risk schedule should be regarded as a starting point from which further investigations and definition of scope can be identified to allow a better informed estimating exercise |                   |                |              | 0              |
|                             | whether a temporary roof is required for the partial re-roofing of the nave                                                                                                                                                                                                                                                                                                                                                                                                                           |        |            | Assumed temporary roof only required for tower roof and not nave                                                                                                                                                                                                                                                                  |                   |                |              |                |
|                             | extent of timber repairs to roof                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |        |            | Carry out inspections as recommended by Structural Engineer; in the meantime a provisional sum is included                                                                                                                                                                                                                        |                   |                |              |                |
|                             | extent of replacement of rainwater goods                                                                                                                                                                                                                                                                                                                                                                                                                                                              |        |            | Survey required; in the meantime a provisional sum is included                                                                                                                                                                                                                                                                    |                   |                |              |                |
|                             | extent of repointing to external stonework                                                                                                                                                                                                                                                                                                                                                                                                                                                            |        |            | 100% repointing assumed                                                                                                                                                                                                                                                                                                           |                   |                |              |                |
|                             | extent of pinning, helifix and cinteck repairs                                                                                                                                                                                                                                                                                                                                                                                                                                                        |        |            | Survey required; in the meantime provisional allowances included as noted in the estimate                                                                                                                                                                                                                                         |                   |                |              |                |
|                             | extent of refixing loose floor tiles in circulation areas                                                                                                                                                                                                                                                                                                                                                                                                                                             |        |            | Survey required; in the meantime, a provisional sum of is included                                                                                                                                                                                                                                                                |                   |                |              |                |
|                             | extent of repair/upgrading building services                                                                                                                                                                                                                                                                                                                                                                                                                                                          |        |            | Survey required; assumption is that minor repair/upgrading may be required                                                                                                                                                                                                                                                        |                   |                |              |                |
|                             | extent of repair to boundary walls                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |        |            | Survey required; provisional sum allowances included as noted in the estimate                                                                                                                                                                                                                                                     |                   |                |              |                |
|                             | The estimate for the reordering works is also subject to a level of interpretation, particularly on specification. Particular issues where there is interpretation risk include:                                                                                                                                                                                                                                                                                                                      |        |            | The estimate is based on the assumption of a 'typical' reordering scheme - i.e. high quality but with an eye on value for money. Again, the estimate is a starting point from which the design can be further developed                                                                                                           |                   |                |              |                |
|                             | floor construction where pew platforms removed                                                                                                                                                                                                                                                                                                                                                                                                                                                        |        |            | Assumption of floor voids to be filled with hardcore and concrete slab over                                                                                                                                                                                                                                                       |                   |                |              |                |
|                             | type of tiled and stone floor coverings                                                                                                                                                                                                                                                                                                                                                                                                                                                               |        |            | Geometric tiles and York stone flags assumed                                                                                                                                                                                                                                                                                      |                   |                |              |                |
|                             | extent of repair work to chancel screen                                                                                                                                                                                                                                                                                                                                                                                                                                                               |        |            | Survey required; provisional sum allowance included for specialist conservation                                                                                                                                                                                                                                                   |                   |                |              |                |
|                             | design for M&E systems                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |        |            | Outline design required; provisional allowances included as stated in estimate detail                                                                                                                                                                                                                                             |                   |                |              |                |
|                             | Design development arising out of consideration of the above                                                                                                                                                                                                                                                                                                                                                                                                                                          |        |            | Contingency allowance of 7.5%                                                                                                                                                                                                                                                                                                     |                   | 7.5 %          | 1,330,700.00 | 99,800         |
|                             | <b>Construction risks</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |        |            |                                                                                                                                                                                                                                                                                                                                   |                   |                |              |                |
|                             | 'Known unknown' risks: i.e. elements where it is known that work is required but the extent is unknown until uncovering work has taken place - e.g. repairs to existing structures                                                                                                                                                                                                                                                                                                                    |        |            | Provisional sums and provisional allowances included in the estimate based on assumptions stated.                                                                                                                                                                                                                                 |                   |                |              |                |
|                             | 'Unknown unknown' risks - additional works arising that were not envisaged at design stage.                                                                                                                                                                                                                                                                                                                                                                                                           |        |            | Allow a general contingency                                                                                                                                                                                                                                                                                                       |                   | 7.5 %          | 1,330,700.00 | 99,800         |
|                             | <b>Employer change risks</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |        |            |                                                                                                                                                                                                                                                                                                                                   |                   |                |              |                |
|                             | Change in scope of works                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |        |            | Budget to be amended in line with any scope change                                                                                                                                                                                                                                                                                |                   |                |              |                |
|                             | Changes in programme                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |        |            | Set realistic programme - budget to be reviewed if any changes                                                                                                                                                                                                                                                                    |                   |                |              |                |
|                             | <b>Employer other risks</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |        |            |                                                                                                                                                                                                                                                                                                                                   |                   |                |              |                |
|                             | Restrictions on works/ temporary works requirements; e.g. security, safeguarding, access for building occupants and visitors, temporary facilities, interpretation.                                                                                                                                                                                                                                                                                                                                   |        |            | Assumed no restrictions and no access to church required during works (or access is arranged that does not interfere with works)                                                                                                                                                                                                  |                   |                |              |                |
|                             | Pricing risk in fees                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |        |            | Seek fee quotations                                                                                                                                                                                                                                                                                                               |                   |                |              |                |
|                             | Additional consultancies not considered at feasibility stage                                                                                                                                                                                                                                                                                                                                                                                                                                          |        |            | Carry out gap analysis; allowance of 10% included for additional consultancies                                                                                                                                                                                                                                                    |                   |                |              |                |
| <b>TOTAL RISK ALLOWANCE</b> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |        |            |                                                                                                                                                                                                                                                                                                                                   |                   |                |              | <b>199,600</b> |

## APPENDIX 1 – BRIEFS FOR DEVELOPMENT STAGE

|                         |         |                                                       |
|-------------------------|---------|-------------------------------------------------------|
| Activity Planner        | page 1  |                                                       |
| Interpretation Designer | page 35 |                                                       |
| TTEA Specialist Advisor | page 41 |                                                       |
| Business Planner        | page 49 | NB: this is an internal brief – non-cash contribution |

### Brief for Activity Planning

#### Requirement:

The Parallel Truths project requires a freelance consultant to research and write an activity plan to support our Delivery Phase application to the National Heritage Lottery Fund (HF).

#### Our Project:

Our project will transform the church of St Mary Magdalene in Stockland physically, socially, intellectually and financially.

- Physically we will make essential repairs to the tower, roofs, gables and stonework and make our bells safe and able to be rung;
- Socially we will reorder the north aisle of the church, screening and insulating it and introducing essential M&E services to enable it to be used by the community as well as heritage visitors, walkers, schools, WWT<sup>23</sup> Steart education groups, CCS<sup>24</sup> for a ‘Talking Café’ and HPC<sup>25</sup> wellbeing department;
- Intellectually we will expose and explore the irrefutable links between the ownership of Stockland and the Daniel family who purchased the estate from Bristol Corporation in 1835 using money derived from their compensation for the loss of their enslaved people;
- Financially, the church will transform from being maintained by a dwindling congregation supplemented by an annual grant from the Parish Meeting to becoming a business-like community asset. This is to move the village’s only public building on to a sustainable business model;

In terms of activity and public engagement, our project will:

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<sup>23</sup> Wetland & Wildlife Trust [Steart Marshes | WWT](#)

<sup>24</sup> [www.somersetagents.org/talking-cafes](http://www.somersetagents.org/talking-cafes)

<sup>25</sup> Hinkley Point C – 1 mile from the church



- Address needs of local people with social, mental and physical issues, exacerbated by COVID and particularly featuring personal and community isolation;
- Employ a PT Activities Co-ordinator to engage new audiences in inclusive activities;
- Create a much-needed community venue of an appropriate scale;
- Bring community members and residents of the Old Vicarage Care Home together;
- Work with parents and grandparents to create bespoke activities for the small number of children in the community, based on developing their interests;
- Strengthen the organisation through partnerships and activities which will continue post project;
- Interpret our colonial history and engage with diverse audiences in-person and on-line;
- Link with schools and tertiary educational resources to enable study of the cross-cultural effects of the enslavement of people within the rural environment;
- Use our churchyard for environmental studies, linking this micro-environment with the nature reserve, the agricultural landscape and the Severn Estuary;
- Increase knowledge and engagement with the flora, fauna (Greater Horseshoe and other bats) and environmental management of the churchyard;
- Ensure our programme is flexible in time and delivery to meet changing external factors, optimise energy use and minimise waste: some online, some in the church & churchyard, and others in the wider environment;
- Co-create layered interpretation of the timeline and people of the village for locals, and tourists alike.

#### Provisional project timetable:

|                    |                                                                             |
|--------------------|-----------------------------------------------------------------------------|
| Early 2024         | Permission to start development project                                     |
| Feb – September    | Building repair and design surveys and decisions                            |
| October – March 25 | Faculty application                                                         |
| May                | Draft business, activity and interpretation plans                           |
| June               | Mid-term review and governance                                              |
| September          | Delivery Stage HF application – end of this contract                        |
| December           | Decision                                                                    |
| Jan - March 26     | Mobilisation and permission to start; appointment of Activities Coordinator |
| March – July       | Internal works – external and tower works continue until December           |

September  
February 2029

Main activity phase begins  
Project ends and final evaluation report

## Requirements

We require the Activity Planner to review the outline activity proposals and take this forward through consultation to develop detailed and costed activity, learning and training proposals for the capital and main activities phases of this project as part of our Heritage Fund Delivery Stage application. We expect the activity planner:

- To undertake a review of existing consultation and potential audiences for the project – their needs and opportunities;
- To undertake further, more detailed, consultation with potential new audiences and their organisations;
- To consider barriers to engagement and how these could be overcome;
- To consider the opportunities for volunteering and how best for volunteering to be developed and managed in the future;
- To assist with public consultation about the whole project (conservation, interpretation, activities) in open days, linking with village events to ensure audiences;
- To feed consultation findings to the Interpretation Designer to ensure themes and media are developed to meet people's requirements;
- To write the brief for the proposed Activities Co-ordinator;
- To contribute to the brief for the proposed evaluation consultant;
- To work with the Business Planner to ensure activities are suitably costed within our project budget and are appropriately scaled and timetabled to ensure sustainability in the long run;
- To work with our Interpretation Designer, diversity specialist and advisory group to ensure user-appropriate activities and language;
- To liaise with the project team so that all plans reflect each other coherently;
- To assist with text for relevant sections of the application form;
- To participate in the development stage evaluation report;
- To assist with appropriate governance procedures within the PCC to ensure organisational understanding and buy-in for the Activity Plan;
- Assist with preparation and attendance as appropriate to HF and other meetings;
- To write an Activity Plan using HF guidance and Investment Principles, reflecting NLHF outcomes and our PCC vision;

The activity consultant will work closely with the Project Manager and write the Activity Plan to meet Heritage Fund published guidance and any advice or feedback received.

**Appointment Timescale:**

Written proposals and fee proposals should be submitted to John McVerry, Project Manager electronically [john@heritageandcommunity.com](mailto:john@heritageandcommunity.com) by XXXXX. Upon appointment, the work will commence as soon as possible.

**The submission** (no longer than four pages of A4) should include:

- Details of the key personnel who will be carrying out the work and their relevant experience (CVs can be attached separately);
- Your proposed methodology and approach to achieve our requirements;
- Your fees showing a breakdown of costs (fees, expenses etc.)
- Payment schedule
- Evidence of PL insurance
- Description of two recent relevant projects (as attachment if preferred) + referee contact details (2)

**Budget:**

The maximum fee available for activity planning is £15,000 including travel and disbursements. The consultant should confirm whether or not they are VAT registered.

**Please contact** the project manager, John McVerry with any questions, clarifications or to arrange a site visit

[john@heritageandcommunity.com](mailto:john@heritageandcommunity.com)

01278 651064 or 07810 433916

Clarifications and points-raised will be shared with all applicants

## Background Information: **COMMON TO ALL BRIEFS**

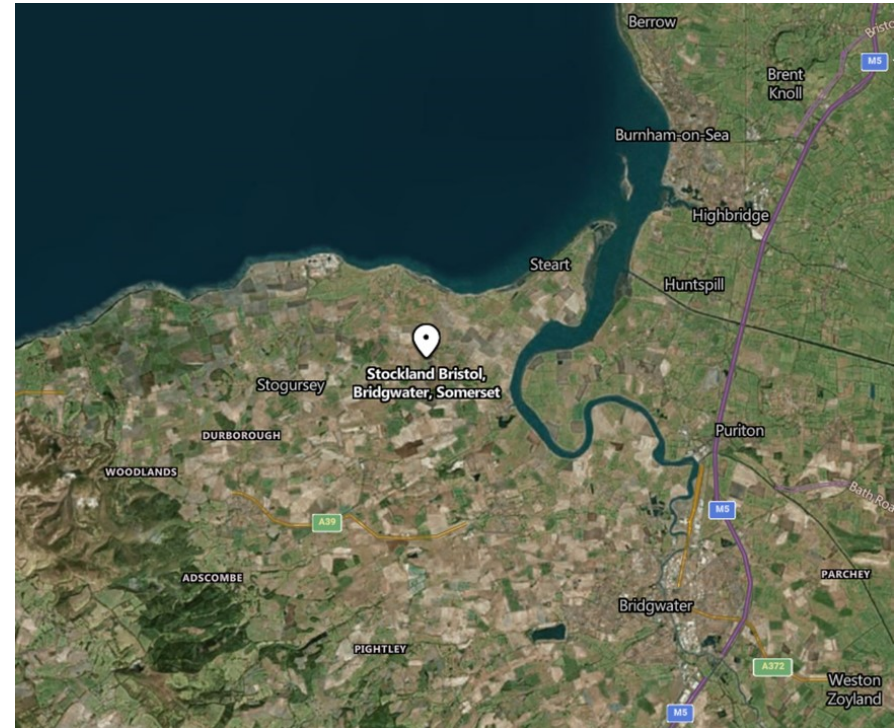
### Our Setting and our Church

Stockland Bristol is a small village 7 miles NW of Bridgwater and 1 mile SE of Hinkley Point – the largest construction site in Europe. With a population of 172 (2021 census and creeping up as barns are converted for domestic use), 27 members of the community are resident in the Old Vicarage Care home, which is the root cause of our population showing an even older than usual proportion for rural communities.

In common with many, our school is long gone, as is our shop and other traditional village resources. Other than a morning bus (only during school terms), there is no public transport within three miles. There has never been a pub in the village, but we benefit from a thriving social club, located in the old school since 1950. Cycling is hindered by the danger represented by the C182 which (having no footpaths) further makes us utterly car-dependant.

Our main (and growing) issue lies around isolation. As a community we are only accessible from the C182, the only transport route to Hinkley Point. This road is intimidatingly fast and busy for many of our older residents and prevents neighbouring communities from considering Stockland as a destination. For individuals, without any publicly accessible space to gather, personal isolation is growing (exacerbated during the pandemic) and on-line shopping, despite our pitiful broadband, is condemning ever more people to solitary lives in their houses and gardens.

Our immediate environment varies massively. Within a mile we have the salt and freshwater marshes of the Steart reserve, owned by the environment agency and managed by the Wetlands and Wildlife Trust. Other than the birds, the marshes are grazed by rare breeds and the insect (and therefore bat) life is rich. But within that mile we also have a commercial shoot, industrial chicken sheds, an intensive dairy farm and hectares of ruthlessly cropped arable fields with all the issues of chemical run-off into the rhynes, lack of diversity, soil depletion and lone-working farm employees. Our views east over Steart to



Burnham and the Mendips or north to Cardiff contrast with the cranes of Hinkley to the NW – and the city-bright light pollution coming from the site. We are exactly 1 mile from the SW Coastal Path.

Politically, we are to be in the new Parliamentary constituency of Burnham and Bridgwater. We are also in the throes of the new One-Somerset local authority reorganisation and the obliteration of Sedgemoor District Council, which has been our civil authority since 1974. We are due to be in the (very logical) Local Community Network (LCN) of 'Dowsborough' on the Quantocks. Stockland is too small for a Parish Council and so operates under the Parish Meeting system whereby every member of the community is in-effect a councillor, with an elected chair to run the obligatory annual AGM. Beyond the minimum, the Parish Meeting meets quarterly and chooses to elect a treasurer and an additional officer to ensure good governance and spread the load of allocating (and organising) the precept. This system ensures frequent and detailed open discussion of local issues and concerns which, having Hinkley on our doorstep, are more considerable than would be expected of a community of this scale and position.

Beyond the Parish Meeting, the community communicates through a monthly c.40-page A4 parish newsletter 'The Gatepost'. There is also a well-subscribed and lively WhatsApp group which (instigated during COVID and perpetuating) allows us to share matters of concern (loitering vans, email scams, waste issues etc) and the all-to-frequent alerts of traffic chaos in Bridgwater and accidents on the C182 and A39.

### **Our Heritage:**

Identified in the Domesday Book, Stockland was, until the 1830s, managed as endowment lands for institutions. Bequeathed to the St Mark's (later Gaunt's) Hospital in Bristol by Maurice de Gaunt in the 13<sup>th</sup>-Century, the manor and lands were sold to Bristol Corporation by the crown in 1541 at the Reformation. Stockland records survive mainly as financial considerations in the Bristol Archive. Following the 1834 Bristol Riots, the Great Reform Act and the general political upheaval in the 1830s, Bristol financed its need to create a police force by selling its endowment lands at Portishead, Stockland and elsewhere.

In the dying throes of its existence, Bristol Corporation sold the Stockland holdings to its outgoing major, Bristol Merchant Venturer Thomas Daniel. Recently (further) enriched by an enormous sum in compensation for the loss of his family's enslaved workers, Daniel purchased Stoodleigh in Devon as his new dynastic seat. He also bought first the advowson and later the manor of Stockland, seemingly as a living for his younger son Henry. The development of the estate progressed somewhat sporadically over the next few decades, but Daniel rebuilt the (fairly new) Vicarage in 1860, followed by the church in 1865-7. For the first time Stockland came under a 'manorial' gaze with a personal (rather than institutional) owner and management for purposes beyond maximum income. The detail of the timeline will be explored during the development phase.

The church was rebuilt on the foundation of the medieval building in 1865/7. The architect is unclear, being identified as 'Arthur of Plymouth' in the listing

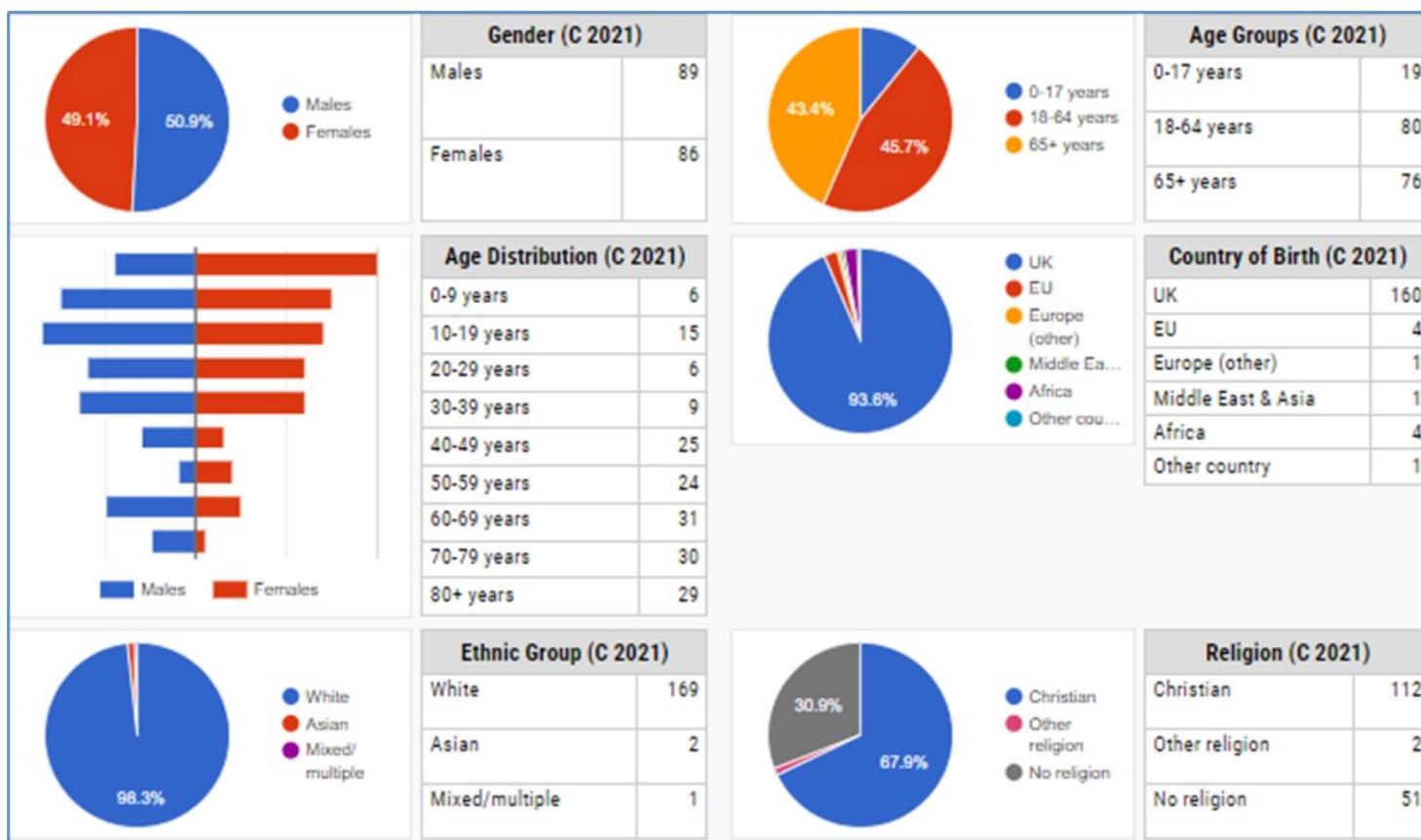


*Detail of Saxton's 1575 map of Somerset (Wells Cathedral offices)*

and as E.W.Godwin by other sources. The result is a competent Victorian gothic structure, well built, but over-sized for the scale of the settlement and correspondingly plain in its decoration. The grade 2 church is currently on the Historic England's 'Buildings at Risk Register' number 1059049. There have been few changes since the rebuilding, most notably the restoration and reintroduction of the medieval screen in c1920 as a Great War memorial, the introduction of a barrel organ and the fixing of two boards commemorating both the fallen and the returned of both wars. The faculty papers in the 1940s include a comment from the archdeacon that to include the names of the returned should be considered 'dangerous'.

A small collection of photographs of the old church and some buildings survive in the vestry and their conservation is included in this application.

Woefully under-listed in the 1980s, Stockland's designations underplay the quality of our built environment. The Manor is listed Grade 2 as is one other house and one farmhouse. Unlisted buildings of note include the (renamed) Manor farm, which was encased in the 19<sup>th</sup>-Century, yet still contains the old roof structures with remnants of thatch within its later roof – and a thatched medieval cottage. We also have a stone-built animal pound which was excluded from the 1830's and 1950's manorial sales, so is assumed to be a parish asset from before the reformation.



Stockland Bristol demographics and stats – 2021 Census. [www.citypopulation.de](http://www.citypopulation.de)



## Our Project:

The project at Stockland began in earnest in 2018 following key observations:

11. The church building is serviceable for small-scale worship events, but (particularly the tower) in urgent need of repair;
12. Stockland is a tiny village, isolated by the Hinkley Point Road, lacking any facilities that cause/allow people to mix, build community cohesion or address isolation;
13. The pressure of the Hinkley road and lack of amenities result (especially since COVID) in many residents becoming increasingly isolated;
14. It is very clear that these issues could be addressed together in our only public building - as long as that building could be adapted as well as repaired;
15. The sums of money involved way outstrip any purely local capacity;
16. Being inexorably linked with the Slavery Compensation pay-out, Stockland offers a potentially interesting place to explore the legacy effects of the transatlantic slavery economy in the rural context;
17. There was huge community appetite for the project;
18. People with the right mix of skills are currently available and willing to undertake the work.

For many years the accepted narrative was that the church building was suffering from subsidence and that its decay was inevitable and terminal. With an elderly incumbent and diminishing congregation numbers, that news fractured resolve to raise money and make repairs.

Since 2015, a new Rector has reinvigorated the PCC and several new people with energy, knowledge and resolve have moved into the village and are working with the PCC to look again. With an eventual Heritage Fund application in mind, a new inspecting architect was appointed (under HF procurement guidelines) to report on the state of the fabric and refresh the quinquennial report. Thanks to an HPC Community Fund grant in 2019, the architect<sup>26</sup> worked with Structural engineers, other specialists and a Quantity Surveyor to assess the repairs liability, prepare survey plans and work through reordering options. At the same time, the project team consulted community members and local agencies to identify the needs of people and the potential for meeting those needs in the (adapted) church building.

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<sup>26</sup> Marcus Chantrey, B<sup>2</sup> Architects of Wedmore: [www.b2architects.com](http://www.b2architects.com)

While the professional team was exploring the building and the project team was consulting to assess its community potential, others looked into the history of the parish and its links with the slavery compensation monies. Extensive consultation with academics in the University of Bristol, local schools and relevant communities (including Daniel descendants from his plantations and correspondence with a British descendent of the Daniel family) demonstrated that level-headed exploration of the chattel-slavery within the context of an unremarkable rural settlement in Somerset could indeed become a significant international resource.

The project had reached the stage of drafting an Expression of Interest to the Heritage Fund in March 2020 when COVID hit and HF closed its funds to new applications.

We took advantage of the lockdown and its aftermath by talking individually to any who we thought might be uncomfortable with the project exposing Stockland's connection to a very unsettling past. We were also able to spend time discussing the issues with those who might see us as a potential deliverer of others' agendas. Potential for polarisation following George Floyd's death and the toppling of the Colston statue in 2020 was averted by being able to have protracted discussions, unhampered by deadlines or programme.

Our Expression of Interest, now under new guidelines etc, was submitted and we were invited to submit this application in early October 2022.

### **Background activity consultation and development**

Understanding that Stockland is a very small community, the project understood from the outset that it would need to work hard to maximise the public benefit to be derived from the Heritage Fund investment. This was not at odds in any way with the aspirations of the PCC, just on a different scale. From the outset we have searched for relevant, appropriate and realistic partners beyond our parish boundaries, recognising that energy use and transport are very real issues for many organisations that might have traditionally been prepared to travel.

We identified our major vulnerabilities as being:

- The scale and demographic of our community means that both audience and volunteer resource is limited and activities will need to be very specifically targeted to meet the needs and attract participation;
- By linking with other organisations to use us as a delivery venue we can work the building without exhausting our people;
- Our demographic is such that we would need to go out to seek BAME and other partners;

- Whilst we can focus on bringing very local schools to site, our focus needs to also be directed on-line to spread our findings and case-study further afield;
- We have very few children in the village, so we would need to work with individuals to promote their interests through their heritage;
- Many of our activities should be achieved through encouraging established groups and networks to use us as a venue for their activities – not for us to try and form competing groups (eg: crafts, book clubs, hobbyists)
- These activities will flex as individuals grow old or move away ... it is up to us to be flexible and welcome all approaches and suggestions.

So far, we have been working on the ideas below. We have had quite detailed conversations with all proposed partners but have not developed them beyond a certain stage as expectations management is a challenge. Introductions to all partners will be given:

| Activity                               | Partner (s)                                                                                                                                                                                 | Likely cost |
|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| 3-day Activity Coordinator for 3 years |                                                                                                                                                                                             | 52,000      |
| Publicity                              | Mainly to be achieved through volunteer social media, editorial in neighbouring parish magazines and enabling scholars writing articles.<br>A-board on coast path<br>? brown sign from C182 | 1,000       |
| Website                                | Michell Dines – professional web designer as volunteer<br>SACN – Somerset African Caribbean Network<br>History Group<br>Bristol University                                                  | 2,750       |
| Volunteer training                     | SPARK Somerset                                                                                                                                                                              | 1,000       |
| Schools programme                      | Brymore Academy, + Cannington, Otterhampton, Nether Stowey, Stogursey and Bridgwater schools                                                                                                | 4,000       |
| Talking Cafe                           | CCS – linking into existing network of talking cafes                                                                                                                                        | 2,000       |
| Honesty cafe                           | SCC (Somerset Council) – SW coast paths – specific walk being planned<br>Coast Path Business network<br>Old Vicarage Care Home<br>West Huntspill Hub                                        | 2,000       |
| Education space for ecology studies    | WWT at Steart                                                                                                                                                                               | -           |
| Counselling space for HPC              | HPC Wellbeing and Chaplaincy                                                                                                                                                                | -           |
| Community resource                     | Crafts groups (contacted and alert)                                                                                                                                                         |             |

|                                                                                                                                          |                                                                                                                                                                                                                                                                                                                |        |
|------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
|                                                                                                                                          | Book club – to be formed when neutral space is available<br>Larkin Club - to be formed when neutral space is available<br>Monday Club – established, but awaiting a neutral space to meet<br>Friday Night Club – village social group<br>Churchyard maintenance volunteers<br>Wilder churchyards<br>God's Acre |        |
| Campanology: forming a bell-ringing group during the development stage to train and practice in readiness for our peal to be revitalised | Newly recruited bell-ringing group<br>Cannington Bell Ringers<br>CCT (Churches Conservation Trust) to practice in neighbouring Otterhampton church                                                                                                                                                             |        |
| Slavery reconciliation. Possibly a performance project to be worked up with others including professional provider                       | SACN<br>Show of Strength Theatre Group<br>Natural Theatre group                                                                                                                                                                                                                                                | 30,000 |
| Interpretation                                                                                                                           | Designer TBA                                                                                                                                                                                                                                                                                                   | 27,000 |
| Evaluation                                                                                                                               | External consultant TBA                                                                                                                                                                                                                                                                                        | 7,000  |

## Activity Plan Brief – Appendix

### Consultation for activities

In preparation for our HPC Community grant in January 2023, the project team undertook further consultation with most of our proposed delivery partners. Detailed notes weren't taken, but each of them wrote in support of the project, summing up our conversations and outlining their intended involvement.

We are still in touch with all of them and there have been no drop-offs. The most complex issue so far has been managing expectations as people are eager to get involved as soon as possible. It is to address this that we have not asked for yet another specific declaration of support for this application.

The letter from the Somerset African Caribbean Network (SACN) is more recent as the relationship has been built up during 2023.

| Name                          | Representing                        | Purpose for inclusion     |
|-------------------------------|-------------------------------------|---------------------------|
| Susann Savidge                | SACN                                | Diversity partners        |
| Ven Simon Hill – Arch Deacon  | Diocese of Bath & Wells             | Rector's manager          |
| Emma Brown                    | Diocesan Advisory Council           | Planning authority        |
| Cllr Mike Caswell             | Somerset Council                    | Local elected member      |
| Tony Green                    | Parish Meeting                      | Parish governance         |
| John Smailes                  | Stockland Social Club               | Key partner               |
| Nicole Turnbull               | Wetlands Trust Steart               | Learning partner          |
| Will Freeman                  | Wetlands Trust Steart               | Wellbeing partner         |
| Claire Luce – Head Teacher    | Otterhampton Primary                | Learning partner          |
| Claire Nurse – Head Teacher   | Cannington Primary                  | Learning partner          |
| Isobel Pring                  | SDC Footpaths                       | Walking routes to coast   |
| Sara Norman                   | Sedgemoor SW                        | Community partner         |
|                               | Neighbourhood police                |                           |
| Leanne Clarke                 | SSAP                                | Wellbeing partner         |
| Lisa Snowdon-Carr             | 2BU Youth Group                     | Young people & equalities |
| Sarah Bennett – Village Agent | CCS                                 | Wellbeing – Talking Cafe  |
| Sam O'Brian - owner           | Old Vicarage Care Home              | Older people & dementia   |
| Vanessa Johnstone-Smith       | Crafts and hobbies                  | Community use partners    |
| Mike Durant                   | Informal self-forming social groups | Community use partners    |
| Bryony Carver                 | Campanologists                      | Forming bell-ring group   |



Date August 7 2023

Ref Letter Stockland Bristol

Dear John

I am writing to you on behalf of Somerset African Caribbean Network

Thank you for meeting with us at the last two meetings to give our members an opportunity to learn about the project.

I am pleased to say that we have contacted our members to gain their views and they are happy for the network to be involved in this project

We look forward to hearing from you in the future

Yours Sincerely

Susann Savidge

Chair of Somerset African Caribbean Network

The Revd Alison Waters  
The Rectory  
27 Brook Street  
Cannington  
Bridgwater  
TA5 2HP

18<sup>th</sup> January 2023

Dear Alison

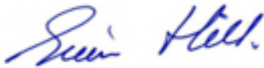
**St Mary Magdalene, Stockland**

As Archdeacon with oversight of this church, I am very keen to voice my unreserved support for St Mary's funding application. The programme to construct funding applications to achieve the necessary repairs and adapt the space for more universal uses and activities looks realistic and the gathering of essential information is the first priority.

Furthermore the church is well supported by a committed PCC and congregation and the Diocese has no current plans for closure. Pastoral reorganisation is planned this year for Quantock Deanery, of which Stockland parish is part, but it will have no impact upon the church's plans for the building.

I very much hope that you are able to secure funding so that this project will be made possible and enable this lovely church to enrich the community it serves.

With my best wishes and prayers,



The Venerable Simon Hill  
Archdeacon of Taunton  
2 Monkton Heights | West Monkton | Taunton | Somerset | TA2 8LU  
01823 413315 | [adtaunton@bathwells.anglican.org](mailto:adtaunton@bathwells.anglican.org)

[www.bathandwells.org.uk](http://www.bathandwells.org.uk)



Flourish House  
Cathedral Park  
Wells  
Somerset  
BA5 1FD

T: 01749 670777

E: [emma.brown@bathwells.anglican.org](mailto:emma.brown@bathwells.anglican.org)

5<sup>th</sup> January 2023

To John McVerry and PCC

Dear John,

**Letter of Support – St Mary Magdalene Stockland Bristol Project**

The Diocese of Bath and Wells wishes to express our upmost support of the innovative heritage and conservation repair project at St Mary Magdalene's church at Stockland Bristol. The isolated rural parish of Stockland, hemmed in by the Hinkley Road, against all odds it committed to remain open and sustainable by contributing its committed share into the common fund and meet its other outgoings.

The positive way the church engages with both its local community and visitors, nationally and internationally to this coastal location is exemplary in the way it has blurred the lines between perceptions of the church as a secular community asset alongside diminishing regular church service attendance.

The parish church was built in 1865 and designed by Arthur of Plymouth for the Daniel family of Stockland Manor. Structural stability is poor with cracking to window surrounds and major fracture through the tower, loose and bulging stonework. The church remains on Historic England's Heritage at Risk register and without support the church will continue to remain in a very poor state.

The project offers an innovative and joined-up approach to address Stockland's complete lack of community space whilst saving its Grade II listed church building.

The Diocesan Advisory Committee (DAC) is working closely with the parish to explore an early 'in-principle' faculty so that the project can continue to develop with confidence, knowing that the

[www.bathandwells.org.uk](http://www.bathandwells.org.uk)

The Bath and Wells Diocesan Board of Finance

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reordering proposals are generally acceptable whilst allowing the detail to be worked up at the appropriate time.

Initial proposals for community activities addressing isolation and service provision to bring people into the village are encouraging - and a lesson for other rural parishes also looking to encourage greater and sustainable use of their church buildings as community assets for all.

Exploration of colonial history in the rural context will be a significant asset to the diocese and tie in with similar work being done across the diocese including; Wells Cathedral, Bath Abbey and nationally.

We thank the local passionate, dedicated volunteers at Stockland for their commitment and hard work to ensuring this church remains open and serving at the heart of the community, together with sharing this important and unique heritage story.

We thank you for your consideration in supporting this project.

Yours sincerely,

Emma Brown  
Church Buildings Adviser  
Diocese Bath and Wells

Cllr Mike Caswell

**From:** M CASWELL <caswell5967@btinternet.com>  
**Sent:** 22 January 2023 12:31  
**To:** john@heritageandcommunity.com  
**Subject:** Re: Stockland project

Dear Parish Chairman

As the District and County Councillor for the Division of Cannington and the Quantocks which contains Stockland-Bristol, I am more than pleased to support you in your application.

I am also a resident. In ~~the passed~~ I have ~~have~~ had the pleasure of being the Parish Chairman and since 2011 the Local Authority Councillor.

Stockland-Bristol always amasses me. It is a small but very resilient and the community spirit is wonderful. Unfortunately it can be isolated especially for the elderly. We do have a large nursing home and a Sports Club. The latter run by a group of fantastic volunteers. which is the Stockland Way!

The C182, this is the main road to Hinkley Point, Isolates Stockland and the only way 'Out and In' is via the C182. Visitors are reluctant to visit because of all the heavy construction traffic. Any incidents on the road can, and has resulted the village being cut off for many hours.

I can just remember the last time the Bells were rung in the Church and the whole village is looking forward to hearing them again.

May I again, offer my full support for the application.

Cllr Mike Caswell

Councill for the Quantocks Sedgemoor District Council  
Portfolio Holder for Infrastructure and Transport Sedgemoor District Council  
County Councillor for the Cannington and Quantocks Division

**From:** Tony Green <[argreen50@gmail.com](mailto:argreen50@gmail.com)>

**Sent:** 16 January 2023 17:41

**To:** [john@heritageandcommunity.com](mailto:john@heritageandcommunity.com)

**Subject:** Re: Urgent request ...

Dear Sir

Reference the Stockland Bristol, HPC Community Fund Application.

Stockland Bristol is too small a parish to warrant a full Parish Council, falling instead under the system of a Parish Meeting. Within the Parish Meeting, every person on the electoral role is effectively a councillor, working under the leadership of a Parish Chair who is the only elected official. The Stockland Parish Meeting meets quarterly (against a legal minimum of annually) and all matters of planning, precept and community issues are discussed, voted on and minuted.

I have been resident in Stockland since 2021 and have attended every Parish meeting over that period. The conversation during these sessions is free flowing and all voices are encouraged. I can confirm the Parish Meeting has been kept apprised at all stages of planning for the church project and is fully supportive of its aims. Proof is that the meeting regularly votes to spend a considerable portion of its precept on maintaining the clock, church and churchyard as, not only is the church the only freely available public building in the village, but people want to prevent further deterioration as the project planning moves forward.

If you require any further details please feel free to make contact.

Kind regards

Tony Green

Wayland Farm  
Stockland Bristol  
Bridgwater  
Somerset  
TA5 2PY

01278 652 532  
07764 162 907  
[argreen50@gmail.com](mailto:argreen50@gmail.com)

The Sport Club  
Stockland Bristol  
Bridgwater  
Somerset  
TA5 2PY

10/01/23

Dear HPC Community Fund Manager,

I write on behalf of the Stockland Sports Club. Along with the church, the Sports and Social Club is the only facility available to residents within the very small village of Stockland Bristol.

The Club was founded in the early 1950s and is a non-profit, volunteer-run sports and social club that operates a bar under a Club Premises Licence. The club is open Monday to Saturday in the evenings from 8pm for socialising and the playing of sports including skittles, pool, darts and badminton. There is a small hall that may be hired by members for parties and other activities as well as village events. Membership is open to all. Although the club hall can be hired during the day, it often proves difficult to find anybody to open up and supervise, due to the need to ensure security of the bar and stock.

The club is aware of the church refurbishment project and fully supports the proposal to create a community space within the church that may be used at short-notice during the day by local people and small groups. Such a facility will be complementary to the clubs aims and what it can provide.

To reiterate, the Stockland Sports Club fully supports this project and will work closely with the organisers through the planning phase for the collective benefit of our small community.

Yours Faithfully,



Jon Smailes

Club Treasurer, on behalf of the Stockland Sports Club committee

From: **Nicole Turnbull** <[Nicole.Turnbull@wwt.org.uk](mailto:Nicole.Turnbull@wwt.org.uk)>

Date: Wed, 18 Jan 2023, 13:58

Subject: Stockland Bristol Church Heritage Lottery Application - WWT SM

To: Jenny McCubbin <[jmccubbin61@gmail.com](mailto:jmccubbin61@gmail.com)>

To whom it may concern,

We are writing in support of this application.

The Wildfowl and Wetlands Trust (WWT) is the UK's leading wetland conservation charity. We're working to create a world where healthy wetland nature thrives and enriches lives. WWT Steart Marshes is the first of WWT's working wetlands. It provides flood defence for local homes and businesses, showcases productive farmland and is home to a thriving nature reserve. The project proves we can fight climate change by working with nature.

We are currently working to develop our own engagement hub, but would value an additional base at Stockland Bristol which could be used to increase engagement opportunities on the freshwater area of the reserve. Visitors to Stockland Marshes would benefit from the sheltered area and honesty café facility. We could use this community space as a base and stop-off for visiting groups (schools, birdwatching and wildlife groups, U3A etc), guided walks and wellbeing sessions.

Yours sincerely

**Nicole Turnbull**

Engagement & Learning Manager

**WWT Steart Marshes**

Reserve Office, Stert Drove, Bridgwater, Somerset, TA5 2PU

**T** 01278 651090  
**M** 07717 342061  
**E** [nicole.turnbull@wwt.org.uk](mailto:nicole.turnbull@wwt.org.uk)  
**W** [wwt.org.uk](http://wwt.org.uk)



Dear To Whom it May Concern,

The Wildfowl and Wetland's Trust remains an important organisation in supporting coastal communities to restore and care for wetlands for the health of people and planet. Our growing health and wellbeing work situated at Steart Marshes, next to Stockland Bristol, specifically embraces emerging research that links our health with the health of ecosystems that we are part of – we build pathways for those experiencing difficulties to access wetlands specifically to improve health.

Our relationships with local primary and social care practices provides routes for people, such as 'green social prescribing', into non-medical support – practically, as indoor, sheltered space is not currently available at Steart Marshes, the revitalisation of this community hub would provide a vital space for our programmes, which are getting more widely supported through NHS and government initiatives. With growing numbers of people needing support for mental and social health issues, spaces such as Stockland Community Hub become part of our day to day activities, as well as wider strategy to further integrate these programmes and alleviate pressures on the NHS.

Recently we undertook research exploring wetlands and health, where the Stockland Church was used as an exhibition space for photographs that were produced during our study. Local people involved led the organisation of the 'Celebrate Stockland and the Marshes' event at the church, bringing all ages together to celebrate their village and build bonds after the difficulties experienced throughout the pandemic. It is great to hear they now want to keep this going and make this space more suitable to their needs.

Since this event, more people are looking to connect up not only with other people in their local area, but with their local wetlands, in turn caring for these vital ecosystems. Our research has shown that community spaces and groups have shut down in the local area due to lockdown restrictions and struggled to return, reducing social spaces where people can come together to share interests, skills and work through collective issues. By developing this community space, including the practically needed facilities, we hope to be able to continue to partner with Stockland communities for our programmes.

The evidence for intentionally building stronger and more connected communities is deep and growing; as loneliness continues to rise, we require more than ever to heed the research that shows our health requires meaningful social connections as much if not more than other more commonly accepted factors<sup>12</sup>. This is an opportunity for an often isolated community to self-determine how they get to show up together, in turn supporting their individual, collective and ecological health and set the foundations for further creating thriving community life.

Yours Sincerely,

Will Freeman

Health and Wellbeing Officer, WWT

<sup>1</sup> <https://journals.plos.org/plosmedicine/article?id=10.1371/journal.pmed.1000316>

<sup>2</sup> <https://journals.sagepub.com/doi/abs/10.1177/0963721421999630>



From "Claire Luce - Otterhampton" <[Claire.Luce@otterhampton.org](mailto:Claire.Luce@otterhampton.org)>

To "[alwaters@hotmail.co.uk](mailto:alwaters@hotmail.co.uk)" <[alwaters@hotmail.co.uk](mailto:alwaters@hotmail.co.uk)>

Date 18/01/2023 14:50:15

Subject Application support letter

Dear Sir or Madam,

### **Application for Funding for St Mary Magdalene Church, Stockland Bristol**

I write to support the application from St Mary Magdalene Church, Stockland Bristol for funding towards improving the building for community use. I was particularly interested to hear about the plans to highlight the history of the church and its relation to the slavery. This will undoubtedly provide our children, which include those who live in Stockland and the surrounding area, with an opportunity to better learn about and understand about the historic injustices of slavery and how it affected even rural areas such as they live in. In addition, the Spinney area will provide an excellent space to investigate local nature and, as a school, we would look forward to seeing how we could use this area with our children to discover, explore and learn about environmental matters.

Yours faithfully

Claire Luce

**Head Teacher**

Otterhampton Primary School

School Lane

Combwich

Bridgwater

TA5 2QS

01278 652487



Brook Street  
Cannington  
BRIDGWATER  
TA5 2HP  
Somerset

Tel 01278 652368  
[office@cannington.somerset.sch.uk](mailto:office@cannington.somerset.sch.uk)

18<sup>th</sup> January 2023

The Rectory  
27 Brook Street  
Cannington  
Bridgwater  
Somerset  
TA5 2HP

Dear Reverend Alison,

#### **Re Improvement Works at Stockland Church**

Following on from our recent meeting at which we discussed potential improvement works that could provide us with a potential opportunity to enrich and expand our curricular provision, I would like to express our interest and support of this idea.

I am supportive of the development of Stockland Church, believing our pupils would gain from these plans in a number of ways.

The architecture and development of historic buildings sits within our historical/geographical and art and design provision. It is my understanding that the building has a number of connections to the historical communities of our local area, for whom a good number of my families connected however, I am also aware of the relevance it holds to the local, national and global slavery trade in previous decades. It can be difficult for young people today to have an understanding of this subject and in identifying a tangible link in their local community would support our delivery of understanding Modern Britain and how their locality came to be the way it is.

As indicated, a number of our families attending Cannington C of E Primary School live in the Stockland Bristol and Steart area. I am very aware of the limited resources these communities



have and of the impact the redevelopment of this historic building might have in keeping a community alive and able to grow within their own facilities.

I would ask that you keep me informed of any developments in the hope our pupils will be able to benefit from the diverse opportunities these works would bring.

Yours sincerely,

C. Nurse

Mrs Claire Nurse – Headteacher



From: Isobel Pring <[isobel.pring@somerset.gov.uk](mailto:isobel.pring@somerset.gov.uk)>  
Date: Wed, 11 Jan 2023, 14:22  
Subject: Stockland Bristol church heritage lottery application  
To: Jenny McC <[jmccubbin61@gmail.com](mailto:jmccubbin61@gmail.com)>

Dear Jenny,

I am writing from the England Coast Path Somerset Trail Partnership to express our support for the planned Stockland Bristol church community space. The ECP Somerset Trail Partnership is responsible for maintaining the England Coast Path in Somerset and meeting Natural England's objectives to provide a trail that,

- enables as many people as possible to enjoy a wide variety of walking and riding **experiences** along National Trails and through the English landscape
- is constantly improved and **enhances** the landscape, nature and historic features within the trail corridor
- **engages** with the communities surrounding it to care for the Trail and the landscape through which it passes
- creates opportunities for local **economies** to benefit from the use of the Trail

Stockland Bristol's proposals for a community space, honesty café and information hub support all these objectives. Once it place it will help us to improve access to the Coast Path, as well as offering walkers a source of refreshment and accommodation while engaging them in the landscape and community history surrounding the Trail.

It will also help to develop a relationship with the local community and landowners to care for the Trail and the local footpaths, which ensures that access is maintained and as many people as possible can explore the local landscape. Finally, it allows the England Coast Path to support local businesses and create income for the local economy.

The project has already sparked plans to develop a walk in the area that will join an existing set of 14 Circular Walk Pocket Guides. The walk will take people through local woods and farmland, while also exploring parts of the Wildfowl and Wetlands Trust's Steart Marshes reserve.

We look forward to working with the community of Stockland Bristol and the Heritage Project to develop the walk and explore activities that will introduce the Coast Path and surrounding area to as many people as possible.

Yours sincerely

Isobel Pring

England Coast Path Officer, Highways Group, Economic & Community Infrastructure, Somerset County Council

Good evening Mr McVerry,

I did indeed speak to Tim about this project. It is without doubt much needed in what is a very isolated community. The police are always looking for innovative ways in which we can keep in contact with members of our community and we recognise that this part of the community is very isolated. We try to bridge the gap in communication by using social media to reach as many people as possible however, this is clearly not suitable or accessible to everyone.

I would very much like the policing team to be able to assist you with your project and look forward to talking to you in greater detail about it. Such a facility would greatly benefit residents and police, allowing us to work together so that people are safe in their community and feel safe.

Kind regards,

Sara

PS 4448 NORMAN  
Sedgemoor Neighbourhood Sergeant

Sedgemoor Police Team | Avon and Somerset Police  
Sandy Padgett House, Express Park, Bridgwater

Mobile 07889659456

Email [4448@avonandsomerset.police.uk](mailto:4448@avonandsomerset.police.uk)

[www.avonandsomerset.police.uk](http://www.avonandsomerset.police.uk) | Follow us on [Twitter](#) and [Facebook](#)



**Avon and Somerset Police**  
**SERVE.PROTECT.RESPECT.**

Somerset Activity and Sports Partnership  
1<sup>st</sup> Floor Offices  
Castle Business Centre  
Chelston Business Park  
Wellington  
TA219JQ

Dear Sir/Madam,

I am writing this letter of support on behalf of Somerset Activity and Sports Partnership (SASP). SASP is dedicated to increasing the health and happiness of residents in Somerset through physical activity and sport. We are a charitable trust and a member of the nationwide network of 43 Active Partnerships, sharing a mission of transforming lives through sport and physical activity and we are governed by a Board of Trustees and funded through Sport England, and grant giving bodies, companies and individuals whom share their mission.

Our vision is to...

**"Achieve healthier and happier communities in Somerset through physical activity"**

We inspire and enable positive life choices through sport and physical activity and we do this by:

- Providing accessible opportunities locally for all ages and abilities.
- Supporting clubs, communities, schools and the workforce to embrace physical activity.
- Bringing together organisations and partners to plan and create a better environment for change.

SASP is supporting this funding application because of its ability to connect with a number of themes embedded within the *Somerset Moves* strategy ([somerset-moves-strategy-final.pdf](https://www.saspsomerset.co.uk/somerset-moves-strategy-final.pdf) ([saspsomerset.co.uk](https://www.saspsomerset.co.uk))), launched in September 2022, believing everyone should have access and opportunity to the benefits of moving regardless of age, gender, race, ability, background or geography. One of these strands includes **Social and Community development**, where sport and physical activity should enable people to have fun, make friends, be healthy and build stronger community connections. Increasing social trust, belonging, and community participation improves road safety, quality of life, place and environment and reduces loneliness which fits perfectly with the purpose of this funding application.

Underneath each of the Somerset Moves strands are programmes of work delivered with a variety of demographics in mind, and we feel that SASP has a real opportunity to link with the Stockland Bristol community and church building through some of these. Firstly, we

have an ever growing social prescribing network of Health and Wellbeing Coaches whose role it is to engage with people and communities who would benefit from one to one and group support to improve health. SASP employ Health and Wellbeing Coaches in both Sedgemoor and West Somerset districts on behalf of their respective Primary Care Networks (PCNs) and these come with expertise in supporting people to move more in ways that work for them and are keen to utilise local facilities, such as the church building to deliver group activity where a need is identified. We know that older adults in particular have been disproportionately impacted by the pandemic and shielding, with deconditioning levels and feelings of loneliness in rurally isolated areas such as Stockland Bristol, being no exception.

SASP are commissioned by Public Health at Somerset County Council to be the lead provider of the Somerset Health Walks scheme which utilises volunteers in rural communities, such as Steart (close to Stockland Bristol), to bring groups of people together, often older adults, to walk and explore the local area. A warm space to be able to meet before or after health walks to chat and have a drink is really important and we would be very keen to expand our programme to support Stockland Bristol residents and help to keep participation at very local levels, because we know the challenges of limited local transport networks in this area. The church building would therefore be an ideal location for the Somerset Health Walks to utilise.

Another Public Health commissioned programme is Move More Together which SASP has developed to connect volunteers with local older adults (over 50) who need support and encouragement to get moving again but whom struggle because of their physical and/or mental health. This programme is in its infancy but we are seeing the number of referrals increasing in rural communities such as Stockland Bristol. Having doorstep facilities offering exercise classes for example, that we can list as options for participating in the programme is invaluable and helps to keep physical activity accessible, manageable and with some longevity.

In conclusion, there are many opportunities for SASP programmes to be able to utilise the church building to support Stockland Bristol residents to become more active and connected for their health and wellbeing, so we provide full support to this funding application and wish the project team all the best with the outcome. We look forward to working with you over coming months, if successful, to expand our provision in your area.

Yours sincerely,

L. Clarke

Lianne Clarke  
Active Ageing Manager  
Somerset Activity and Sports Partnership

John McVerry  
Project Lead  
'Building on the Foundations' Project  
c/o The Poplars  
Stockland Bristol  
Bridgwater  
TA5 2PZ

January 2023

Dear John,

**Letter of support for 'Building on the Foundations' at Stockland Bristol**

2BU Somerset is delighted to offer support for this project and look forward to helping to meet its objectives.

2BU-Somerset provides a specialist support service serving the needs of young lesbian, gay, bisexual, transgender and questioning (LGBTQ+) people aged 11-25 across Somerset. Our central aim is to help build resilience and confidence and support each young LGBTQ+ person to a place of healthy self-acceptance.

2BU welcomes the involvement of young people in community projects. It is useful to us as it gives an LGBT+ presence and voice across all sections of our communities and it involves young people in communities where they might be invisible.

We look forward to working with the project team, to devise a programme of activities which will enrich the community of Stockland and offer experience and new skills to our young people. We are particularly pleased to be involved at this stage as the young people can be part of designing facilities and ensure that they are accessible and inclusive.

If you need any further information, please do not hesitate to contact me.

Yours sincerely



Lisa Snowdon-Carr  
Chief Executive





Tue 17/01/2023 11:09

Sarah Bennett <sarahb@Somersestrcc.org.uk>

Stockland Bristol Church

To john@heritageandcommunity.com

 Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Was lovely to meet you last Friday at Stockland Bristol Church.

As the Village Agent that covers the village, I am aware of the isolation of many of the residents. The village has many residents who would benefit from a "warm space", and the Church could lend itself to this beautifully! It is the heart of the village, an excellent location.

Many of the residents have lost their confidence in going out due to the increased HPC traffic as well as the isolation brought on by The Pandemic.

As Village agents we look to communities for support-and we hold "Talking cafes" and we attend community events which are held in village halls and community centers. At this moment we have a real gap in the Stockland Bristol area-our nearest Talking cafe is Bridgwater, and the next one is in Minehead.

If the Church was successful in becoming a Community Hub I would like to attend on a regular basis-once a month so that anyone in the community could have a chat face to face to see what we can offer in the way of support. Anyone can refer themselves in for support for themselves or friends or relatives that they might be worried about. A coffee and a chat in a relaxed atmosphere can sometimes be the start of some valuable help and support for people.

As Village Agents we link into many other services-Age UK, Somerset Sight, Deaf Plus, Sedgemoor Lifeline, SASP, Citizens Advice to name a few. We often ask these services to join us at our Talking cafes.

Please let me know how the project unfolds-an exciting opportunity for the village and its residents.

Kind regards,

Sarah  
Sarah Bennett  
Sedgemoor Village Agent

Tel: 01823 331222  
Mobile: 07985680269  
E-mail: [sarahb@somersetrcc.org.uk](mailto:sarahb@somersetrcc.org.uk)



**From:** Sam O'Brien <sam@restcare.co.uk>  
**Sent:** 04 January 2023 16:05  
**To:** john@heritageandcommunity.com  
**Cc:** Susan Thomas <sue@restcare.co.uk>; Louise Parsons <loupydo@icloud.com>  
**Subject:** An accessible community space at Stockland Church

Dear John,

We are delighted to hear about the plans to repair the church and create an accessible community space for the village.

With available wheelchair access, I know many of our residents would embrace activities in such a close environment. If there were opportunities for attending coffee mornings and other social functions it would only enhance daily life for them. Having such an environment within walking distance would be so positive for our residents, somewhere they could feel comfortable and part of village life and even make new friends. Being able to walk a short distance over to the church or be assisted in a wheelchair is so achievable and I know many family members and friends would enjoy being a part of this community initiative too.

We should very much like to be involved in the planning process if possible, we feel that our thoughts on disabled access, w/c facilities and our expertise in care of the elderly would be helpful. As you are aware we are the only employer in the village and employ 27 staff to look after our 25 residents. We have been very happy to maintain the grass around the village bench for the last 27 years and held the Stockland Fete in our grounds for many years, supporting the church and village fundraising efforts.

We are very proud to have won a care award in 2022 placing us in the top 20 care homes in the South West and we feel that we could contribute positively to the planning process, particularly in the early stages.

We look forward to hearing how things progress and wish everyone involved the very best.

Kind regards

Sam

Samantha O'Brien  
Director

The Old Vicarage  
Stockland Bristol  
Bridgwater  
Somerset  
TA5 2PZ

01278 653056

restcare  
because we're all individuals



Southbrook House  
Stockland Bristol  
Bridgwater  
Somerset  
TA5 2PY

Dated 04 January 2023

Dear Sirs

As shown by Stockland's very successful celebratory Craft Exhibition in August 2022 and as a follow up in December, a very vibrant Craft Fair, our village (along with neighbouring communities) are rich with craftspeople and creatives. In our midst we have wood-turners, needle workers, artists, jewellers and a whole gambit of other interests and talents. In addition we are a community of keen gardeners, environmentalists and dog-walkers.

What we lack is a place to meet, share, troubleshoot and be sociable in our endeavours. It is not easy to encourage people into private homes, partly because for many reasons they feel unable to host a gathering. The social club is not an option as it requires staffing to open and therefore is too pricy for a small or informal gathering. Joining in with groups in other places involves negotiating the Hinckley Road, which many choose to avoid. For many, living in this unique village, we have few public services or amenities, and the internet reception to anywhere within or outside our community is extremely poor. As a result, most people work in their own homes in isolation and miss the opportunity to share, develop or join a project and work together.

The proposal for the north aisle of the church will offer opportunities for pairs or groups to meet on neutral ground and share their enthusiasm, learn from each other and for many, the accessible space will be small enough to be intimate, large enough to mix and a reason to get up and look forward to getting out of their homes/gardens.

The wellbeing of our community is so important, as a Tutor of Creative studies in Further Education both at certificated and non-certificated level for over 30 years, I have witnessed and personally experienced at close-hand how personal development and inclusion can support personal wellbeing. I made an in depth study of this concept while doing my M.A. in Professional Studies, looking at in particular the benefits that can be gained from the unquantifiable values of learning and of inclusion, including the environment in which people learn and share time in with others. Therefore, having a kitchenette, lavatory and a modicum of heat will make it a more conducive space to gather in. We would also hope to involve residents from the Old Vicarage care home to join in, sharing in a friendly and informal way, their experiences and expertise and generally feel a part of our village life in which I and my family have lived for over 23 years.

Thank you for this opportunity to share a vision for our unique village.

Yours Sincerely,  
Vanessa Johnstone-Smith MA

**From:** Wendy Durant <wendy13s@hotmail.co.uk>  
**Sent:** 19 January 2023 21:12  
**To:** john@heritageandcommunity.com  
**Subject:** Re: Church project

Dear John

Further to our letter dated 11<sup>th</sup> October 2019 in support of the Church Project we would like to add to the points we made at that time.

We mentioned previously that the Monday Club had been created as a meeting and socialising occasion which would allow local villagers to meet on a regular basis in order to get together, chat, put the world to right and most importantly enjoy each other's company. These get-togethers were held in the villager's own homes but the group became too large so being able to meet up in the Church with so much more room would be amazing. Some folks found their homes were too small for a large gathering, which caused them some embarrassment at being unable to hose and impacted somewhat on their attendance!

Obviously during the covid pandemic all these meetings had to stop but since covid we have restarted the meetings, although the elephant is still in the room and the number of local people attending dwindled so much so that regular meetings are halted for the time being. It would make such a huge difference if the Church Project goes ahead and I have no doubt that being able to regularly meet at the church would significantly boost the Monday Club members.

As you know, I edit The Stockland Gatepost, our monthly magazine and have received comments from both Stockland residents and residents of other nearby villages to the effect that the church could become a much needed venue for all sorts of interest and activities such as a craft, ukulele, photographic, Breakfast Club, gardening clubs etc to name just a few. The church would provide a wonderful warm space complete with refreshment and toilet facilities where so many local villagers would be able to meet regularly and enjoy their many varied interests.

Kind regards

Mike Durant

**From:** Bryony Carver <carverbryony@gmail.com>  
**Sent:** 15 January 2023 08:43  
**To:** John McVerry <john@heritageandcommunity.com>  
**Subject:** Campanology letter

Dear John,

Traditionally Stockland Bristol was a key player in the bell-ringing of the area. Sadly, the bells were silenced in the late 1970s as the tower had become too unsafe for bell-ringing to continue. On the last occasion, one ringer hung her coat in the ringing chamber only to find that at the end of the session the masonry had opened and reclosed, trapping her coat; they had to ring again to open up the cracks sufficiently to retrieve it. Without bells to ring, the troupe disbanded and the custom faded from the collective memory.

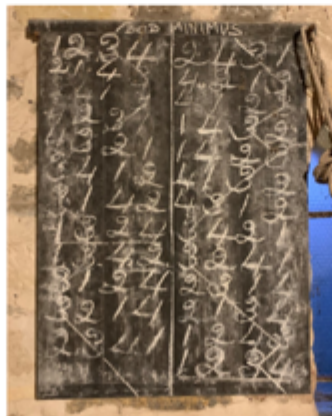
There is real excitement in the village and locally at the prospect of making the tower safe and rehangng the bells as part of the project. Cannington has offered to support us with recruiting and training ringers so that our grand reopening might be celebrated with our own bell ringers ringing our own bells. Fortunately, all the immediate neighbours are really supportive.

Promoting involvement as a mix of tradition, social interaction and exercise, we will begin to formally recruit and train once the project has advanced sufficiently to make it a probability. Despite our enthusiasm we understand the Heritage Fund process and our need to avoid building up too many expectations too early. Anecdotally there is likely to be really good take-up and we already foresee bell practice sessions ending up with a debrief in the social club. It will be good too to welcome bellringers from other parishes into the church and village and put the Stockland peal back on the scene. We hope too, to liaise with other groups for people to have a go at the bells when they are involved in other activities at the church, but that will all be developed as the planning progresses.

I have attached recent photos of two of the bells, a plaque commemorating a marathon peal in 1967, and a chalked board, showing what was probably the last sequence to be rung in the tower of St Mary Magdalene.

Kind regards

Bryony (Carver)



## Brief for Interpretation Planning

### Requirement:

The Parallel Truths project requires a freelance consultant to research and write an Interpretation plan to support our Delivery Phase application to the National Heritage Lottery Fund (HF) and to deliver the interpretation materials during the capital phase.

### Our Project:

Our project will transform the experience of being in the church of St Mary Magdalene in Stockland physically, socially, intellectually and financially.

- Physically we will make essential repairs to the tower, roofs, gables and stonework and make our bells safe and able to be rung;
- Socially we will reorder the north aisle of the church, screening and insulating it and introducing essential M&E services to enable it to be used by the community as well as heritage visitors, walkers, schools, WWT<sup>27</sup> Steart education groups, CCS<sup>28</sup> for a 'Talking Café' and HPC<sup>29</sup> wellbeing department;
- Intellectually we will expose and explore the irrefutable links between the ownership of Stockland and the Daniel family who purchased the estate from Bristol Corporation in 1835 using money derived from their compensation for the loss of their enslaved people;
- Financially, the church will transform from being maintained by a dwindling congregation supplemented by an annual grant from the Parish Meeting to becoming a business-like community asset. This is to move the village's only public building on to a sustainable business model;

In terms of addressing the Daniel family (and by extension our community) links with the Transatlantic Trafficking of Enslaved Africans (TTEA) trade and the compensation paid on its abolition, our project will:

- Interpret our community's irrefutable links with the Thomas Daniel, a Bristol Merchant who, at the time of the compensation payouts, proved that he owned in excess of 4,000 enslaved people;
- Create a venue that is accessible (in all meanings) and attractive for diverse communities to explore heritage and our wonderful natural environment;
- Create activities in tandem with Somerset's small, but important community of African Caribbean descent;

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<sup>27</sup> Wetland & Wildlife Trust [Steart Marshes | WWT](#)

<sup>28</sup> [www.somersetagents.org/talking-cafes](http://www.somersetagents.org/talking-cafes)

<sup>29</sup> Hinkley Point C – 1 mile from the church

- Create resources for schools and tertiary educational to enable study of the cross-cultural effects of the enslavement of people within the rural environment;
- Ensure the resources it creates are linked into go-to on-line resources for diverse audiences, not marooned in a parish website;
- Address the fact that life improved locally during the Daniel-family tenure;
- Address the issues of reconciliation and community reparations;
- Strengthen the organisation through partnerships and activities which will continue post project;

#### **Provisional project timetable:**

|                    |                                                                             |
|--------------------|-----------------------------------------------------------------------------|
| Early 2024         | Permission to start development project                                     |
| Feb – September    | Building repair and design surveys and decisions                            |
| October – March 25 | Faculty application                                                         |
| May                | Draft business, activity and interpretation plans                           |
| June               | Mid-term review and governance                                              |
| September          | Delivery Stage HF application – <u>break clause in this contract</u>        |
| Jan - March 26     | Mobilisation and permission to start; appointment of Activities Coordinator |
| March – July       | Internal works – external and tower works continue until December           |
| September          | Main activity phase begins                                                  |
| November           | Installation of interpretive materials                                      |
| February 2029      | Project ends and final evaluation report                                    |

The programme has been worked up around the processes for achieving planning and fundraising. It is expected that the majority of the development for activities and interpretation will be undertaken during the first 12 months. The contractor will need to keep in touch with the project however to read and comment on drafts, attend the Heritage Fund Mid-term review and ensure that our final application documents reflect all relevant communities and ideas.

#### **Requirements**

We require the interpretation planner to review the outline project proposals and take them forward through understanding the consultation to develop detailed and costed interpretation proposals as part of our Heritage Fund Delivery Stage application. We expect the interpretation planner at the development phase:

- To read and understand existing consultation from potential audiences for the project so that interpretation proposals on themes and media meet our audiences' needs and requirements;
- To attend relevant Project Team Meetings in person or by Zoom;
- To consider physical, social and intellectual barriers for people engaging with interpretation and, working with the Old Vicarage Care Home and relevant partners, how these could be overcome;
- To design a cohesive, costed and inclusive interpretation strategy that builds on and complements our existing knowledge of the church and encourages co-creation of interpretive material;
- To plan co-creative interpretation with community members, including research and commentary on concepts and drafts;
- To assist with public consultation about the whole project (conservation, interpretation, activities) in open days;
- To work closely with our appointed specialist adviser, Somerset African Caribbean Network (SACN), Bristol academics and local schools to ensure language is age relevant and considered suitable by our diverse partners;
- To work with our Web specialist to ensure information is consistent and travels across media – and has a house style;
- To work with the Business Planner to ensure interpretation is suitably costed within our project budget and is sustainable in the long run (Management and Maintenance Plan);
- To work with our Activity Plan consultant (at development) and our activities coordinator (at delivery) to ensure activities and interpretation are intertwined;
- To work with our TTEA<sup>30</sup> Adviser to ensure inclusive tone and content of the Interpretation plan;
- To liaise with the project team so that all plans reflect each other coherently;
- To assist with text for relevant sections of the application form;
- To contribute to the development phase evaluation report;
- To assist with appropriate governance procedures within the PCC to ensure organisational understanding and buy-in for the Interpretation Plan;
- To write an Interpretation Plan reflecting NLHF outcomes, Investment Principles and our PCC vision.

At the delivery phase, we expect the interpretation planner to:

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<sup>30</sup> Transatlantic trade in Enslaved Africans

- Deliver and install the interpretation on time and as presented and costed in the Interpretation Plan.
- Work with the community and our associated partners to enable research on the different heritage themes;
- The Designer will also be required to participate in the Evaluation process.

All proposed interpretation material and plant should be robust, easy to clean and update, and efficient to run.

The interpretation consultant will work closely with the Project Manager and write the Interpretation Plan to meet Heritage Fund published guidance and any advice or feedback received.

#### **Appointment Timescale:**

Written proposals and fee proposals should be submitted to John McVerry, Project Manager electronically [john@heritageandcommunity.com](mailto:john@heritageandcommunity.com) by XXXXX. Upon appointment, the work will commence as soon as possible.

**The submission** (no longer than six pages of A4, but examples of other projects can be supplied separately) should include:

- Details of the key personnel who will be carrying out the work and their relevant experience (CVs can be attached separately);
- Your proposed methodology and approach to achieving our requirements;
- Your fees showing a breakdown of costs (fees, expenses etc.)
- Payment schedule
- Evidence of PL/PI insurances
- Description of two recent relevant projects (as attachment if preferred) + referee contact details (2)

#### **Budget:**

The maximum fee available for interpretation is £22,000 (33% at development, 67% at delivery) to include travel and disbursements. The budget for interpretation materials is £7,000. The consultant should confirm whether or not they are VAT registered.



In accordance with our energy principles, it is expected that the adviser will minimise energy use wherever possible through using zoom and public transport. However, we acknowledge that this is not always possible in the rural environment.

Currently we envisage that in-person meetings will be required at start-up and up to three project meetings. Attendance will also be required at the HF Mid-term meeting and at any other HF meetings. Attendance will be necessary for engagement and consultation sessions with groups and partners;

**Please contact** the project manager, John McVerry with any questions, clarifications and/or to arrange a site visit

[john@heritageandcommunity.com](mailto:john@heritageandcommunity.com) 01278 651064 07810 433916

Clarifications and points-raised will be shared with all applicants

#### **Interpretation development – work done so far:**

Understanding that Stockland is a very small community, the project understood from the outset that it would need to work hard to maximise the public benefit to be derived from the Heritage Fund investment. This was not at odds in any way with the aspirations of the PCC, just on a different scale. From the outset we have searched for relevant, appropriate and realistic partners beyond our parish boundaries, recognising that energy use and transport are very real issues for many organisations that might have traditionally been prepared to travel.

In terms of considering interpreting the church and community, we identified our major vulnerabilities as being:

- Written records are quite scant as the estate was managed as an endowment property until the 1830s and the family records did not survive the Daniel family leaving Stockland in 1956;
- No current villagers have been here since before 1963 and the longest surviving resident now lives away and is elderly (but still very active);
- We are a very white community and need partners from different relative heritages to interpret and understand the TTEA aspects and continuing impacts. We also/particularly need partnership collaboration regarding the use of words and language;
- The world of interpreting and addressing the legacy of Britain's colonial past is moving rapidly and we must avoid becoming a period-piece in terms of interpreting this period;
- In a world of culture wars and vitriolic language, we must protect ourselves and our community from becoming the target of unwarranted abuse;

- We need to be able to demonstrate to HF, Academic partners, diverse partners and audiences that we warrant their trust;

In preparation for the project, we have:

- Viewed all recognisably relevant records in the South West Heritage Centre in Taunton (and, by extension Devon as they share an index)
- Assessed the relevant record lists held in the Bristol Archive – these are very complex as the Stockland Estate is referred to in financial reports to the Corporation, but there seem to be few that immediately suggest they will have social or human interest;
- Had extensive conversations with Ruth Hecht – a Bristol historian working on the mercantile families and their period and legacy links to the transatlantic slave trade;
- Made links with white and Caribbean descendants of Thomas Daniel
- Had detailed conversations locally to allay fears and pre-empt and opposition from within the community;
- Had extensive conversations with Diocesan staff and clergy to ensure their support;
- Secured a copy of the long-out-of-print Stockland history publication

These contacts will all be shared and introductions/information made available to the appointed consultant

## Brief for an advisor on the legacy of the transatlantic trade in enslaved people and its abolition

### Requirement:

The *Parallel pasts – connected futures* project requires a freelance consultant to liaise between our activity and interpretation consultants – and our network of academics, community advisers and affiliates to support our Delivery Phase application to the National Heritage Lottery Fund (HF).

### Our Project:

Our project will transform the experience of being in the church of St Mary Magdalene in Stockland physically, socially, intellectually and financially.

- Physically we will make essential repairs to the tower, roofs, gables and stonework and make our bells safe and able to be rung;
- Socially we will reorder the north aisle of the church, screening and insulating it and introducing essential Mechanical & Engineering (M&E) services to enable it to be used by the community as well as heritage visitors, walkers, schools, WWT<sup>31</sup> Steart education groups, CCS<sup>32</sup> for a 'Talking Café' and HPC<sup>33</sup> wellbeing department;
- Intellectually we will expose and explore the irrefutable links between the ownership of Stockland and the Daniel family who purchased the estate from Bristol Corporation in 1835 using money derived from their involvement in the slavery economy including their compensation for the loss of their enslaved people. In addition, we will (building on the Millennium publication and available records), explore the history of the village (environment, buildings, ownerships) and, where possible, its people;
- Financially, the church will transform from being maintained by a dwindling congregation supplemented by an annual grant from the Parish Meeting to becoming a business-like community asset. This is to move the village's only public building on to a sustainable business model;

In terms of addressing the Daniel family's (and by extension our community's) links with the slavery economy and the compensation paid on its abolition, our project will:

- Interpret our community's family links with Thomas Daniel, a Bristol Merchant who, at the time of the compensation payments by the British Government to slave owners when slavery was abolished, owned more than 4,000 enslaved people;

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<sup>31</sup> Wetland & Wildlife Trust [Steart Marshes | WWT](#)

<sup>32</sup> [www.somersetagents.org/talking-cafes](http://www.somersetagents.org/talking-cafes)

<sup>33</sup> Hinkley Point C – 1 mile from the church

- Create a venue that is accessible (in all meanings) and attractive for diverse communities to explore heritage and our wonderful natural environment;
- Create activities in tandem with Somerset’s small, but important community of people of African Caribbean descent;
- Create resources for schools and tertiary educational to enable study of the cross-cultural effects of the slavery economy within rural communities;
- Ensure the resources it creates are linked into go-to on-line resources for diverse audiences, not marooned in a parish website;
- Address the fact that life improved locally during the Daniel-family tenure;
- Address the issues of reconciliation and community reparations;
- Strengthen the organisation through partnerships and activities which will continue post project;

#### **Provisional project timetable:**

|                     |                                                                                              |
|---------------------|----------------------------------------------------------------------------------------------|
| Early 2024          | Permission to start development project – appointment of development contractors/consultants |
| May – March 25      | Consultation to work up activity and interpretation plans                                    |
| Feb – September     | Building repair and design surveys and decisions                                             |
| October – March 25  | Faculty application                                                                          |
| January 25 – August | Match fundraising                                                                            |
| May                 | Draft business, activity and interpretation plans                                            |
| June                | Mid-term review and governance                                                               |
| September           | Delivery Stage HF application – <u>the end of this contract</u>                              |
| Jan - March 26      | Mobilisation and permission to start; appointment of Activities Coordinator                  |
| March – July        | Internal works – external and tower works continue until December                            |
| September           | Main activity phase begins                                                                   |
| November            | Installation of interpretive materials                                                       |
| December 28         | Project ends and final evaluation report                                                     |

The programme of work for this contract has been set around the processes for achieving planning and fundraising. It is expected that the majority of the development work for activities and interpretation will be undertaken during the first 12 months [May '24 – May '25]. The contractor will subsequently need to keep in touch with the project to read and comment on drafts, attend the Heritage Fund Mid-term review and ensure that our final application documents reflect all relevant communities and ideas.

## Requirements

There is no specific written report or output associated with this contract, but we require the services of a specialist adviser to work with the professional team, the volunteer project team, advisory groups and public (and specific) consultees to guide the project through potentially sensitive issues and ensure that we can address this important aspect of our heritage confidently – and bring our allies with us. We have defined this as seeking an adviser:

- To have:
  - A thorough knowledge of the history of Britain's involvement of the Transatlantic Trafficking of Enslaved Africans (TTEA), the broader slavery economy and the compensation awards made following the abolition of slavery;
  - An up-to-date knowledge of the language used in relation to the TTEA;
  - A thorough understanding of the ongoing impact of Britain's colonial history, particularly in relation to discrimination and racism, and contemporary protests such as the tearing down of Colston's statue in Bristol;
  - An understanding of how local communities can engage with reparations and restorative justice;
  - Experience of engaging people of different ages with 'Hard History';
  - Experience of working with local communities and diverse audiences on heritage focussed projects, particularly in relation to interpretation, online resources and public engagement;
  - Experience of working with advisory groups and multi-discipline project teams (professional and voluntary);
  - Experience/understanding of working within the National Lottery Heritage Fund application process;
  - The ability to work an occasional evening or weekend, should the project require it.

The role of the Advisor is:

- To advise on how we can build on existing consultation from potential audiences for the project so that it remains inclusive and so meet our audiences' needs and requirements;
- To advise on physical, social and intellectual barriers for people engaging with our interpretation, working with our consultees, on how these can be overcome;
- To advise on a cohesive, costed and inclusive engagement strategy that builds on and complements our existing knowledge of the TTEA and encourages co-creation of interpretive material suitable for diverse audiences;
- To assist with public consultation about the project in open days and off-site focus groups and events;
- (With the Project Manager), to build up an advisory group to take us into the delivery phase;
- In the context of the Daniel family and slavery: to comment on drafts and final documents prepared by others:

- To work with our Web specialist to ensure information is consistent and travels across media;
- To work with our Activity Plan consultant to ensure that our delivery proposals match our aspirations;
- To work with our Interpretation consultant to ensure that our interpretation plans embrace the diversity of our co-creators in tone and content;
- To work with our Business Plan consultant to ensure that our delivery plans are costed and achievable within our budgets;
- To assist with text for relevant sections of the application form;
- To work closely with our current advisers, Somerset African Caribbean Network (SACN), Bristol academics and local schools to ensure language is age relevant and considered suitable by our diverse partners;
- To assist with appropriate governance procedures within the PCC to ensure organisational understanding and buy-in for the Interpretation and activity plans;
- To advise on relevant sections for match-funding applications and correspondence with statutory and regulatory bodies;
- To attend relevant Project Team Meetings in person or by Zoom as required;
- To contribute to the development phase evaluation report.

The main thrust of this contract is to ensure that matters relating to TTEA and the slavery economy are included in all relevant sections of our delivery plans, working closely with the Project Manager, Interpretation Designer and Activity Plan writer and participating in whole-team project meetings and HF meetings as appropriate.

#### **Appointment Timescale:**

Written proposals and fee proposals should be submitted to John McVerry, Project Manager electronically [john@heritageandcommunity.com](mailto:john@heritageandcommunity.com) by XXXXX. Upon appointment, the work will commence as soon as possible.

**The submission** (no longer than four pages of A4) should include:

- Details of the key personnel who will be carrying out the work and their relevant experience (CVs can be attached separately);
- Your proposed methodology and approach to achieving our requirements;
- Your fees showing a breakdown of costs (fees, expenses etc.)
- Payment schedule
- Evidence of PL/PI insurances

- Description of two recent relevant projects (as attachment if preferred) + referee contact details (2)

**Budget:**

The maximum fee available for this work is **£9,000**. There is a maximum of an additional £500 available for travel and expenses, but it is expected that the adviser will minimise energy use wherever possible through using Zoom and public transport. However, we acknowledge that this is not always possible in the rural environment.

Currently we envisage that in-person meetings will be required at start-up and up to three project meetings. Attendance will also be required at the HF Mid-term meeting and at any other HF meetings. Attendance will be necessary for engagement and consultation sessions with groups and partners;

The applicant should confirm whether or not they are VAT registered.

**Please contact** the Project Manager, John McVerry with any questions, clarifications and/or to arrange a site visit

[john@heritageandcommunity.com](mailto:john@heritageandcommunity.com) 01278 651064 07810 433916

Clarifications and points-raised will be shared with all applicants

### **Background work so far:**

Understanding that Stockland is a very small community, the project understood from the outset that it would need to work hard to maximise the public benefit to be derived from the Heritage Fund investment. This was not at odds in any way with the aspirations of the PCC, just on a different scale. From the outset we have searched for relevant, appropriate and realistic partners beyond our parish boundaries, recognising that energy use and transport are very real issues for many organisations that might have traditionally been prepared to travel.

In terms of considering interpreting this aspect of the heritage of the church and community, we identified our major vulnerabilities as being:

- Written records are quite scant as the estate was managed as an endowment property until the 1830s and the family records did not survive the Daniel family leaving Stockland in 1956;
- No current villagers have been here since before 1963 and the longest surviving resident now lives away and is elderly (but still very active);
- We are a very white community and need partners from different cultural heritages to interpret and understand the colonial aspects of our heritage and continuing impacts. We also/particularly need partnership collaboration regarding the use of words and language;
- The world of interpreting and addressing the legacy of Britain's colonial past is moving rapidly and we must avoid becoming a period-piece in terms of interpreting this period;
- In a world of culture wars and vitriolic language, we must protect ourselves and our community from becoming the target of unwarranted abuse;
- We need to be able to demonstrate to HF, academic partners, diverse partners and audiences that we warrant their trust;

In preparation for the project, we have:

- Viewed all recognisably relevant records in the South West Heritage Centre in Taunton (and, by extension Devon as they share an index);
- Assessed the relevant records held in the Bristol Archive – these are very complex as the Stockland Estate is referred to in financial reports to the Corporation, but there seem to be few that immediately suggest they will have social or human interest;
- Had extensive conversations with Ruth Hecht – a Bristol based researcher with 40 years' experience of managing cultural projects in communities who has been researching mercantile families and their legacy linked to the slavery economy; she is also an indirect descendent of Thomas Daniel
- Made presentations to (and secured the partnership of) the Somerset African Caribbean Network (SACN);
- Made links with white descendants of Thomas Daniel and people of African Caribbean descent whose ancestors were enslaved by him;



- Had detailed conversations locally to allay fears and pre-empt any opposition from within the community;
- Had extensive conversations with Diocesan staff and clergy to ensure their support;
- Secured a copy of the long-out-of-print Stockland history publication.

These contacts will all be shared and introductions/information made available to the appointed consultant.

## Brief for Business Planning – In-house as non-cash contribution

### Requirement:

The Parallel Truths project requires a freelance consultant to research and write a business plan to support our Delivery Phase application to the National Heritage Lottery Fund (HF).

### Our Project:

Our project will transform the experience of being in the church of St Mary Magdalene in Stockland physically, socially, intellectually and financially.

- Physically we will make essential repairs to the tower, roofs, gables and stonework and make our bells safe and able to be rung;
- Socially we will reorder the north aisle of the church, screening and insulating it and introducing essential M&E services to enable it to be used by the community as well as heritage visitors, walkers, schools, WWT<sup>34</sup> Steart education groups, CCS<sup>35</sup> for a 'Talking Café' and HPC<sup>36</sup> wellbeing department;
- Intellectually we will expose and explore the irrefutable links between the ownership of Stockland and the Daniel family who purchased the estate from Bristol Corporation in 1835 using money derived from their compensation for the loss of their enslaved people;
- Financially, the church will transform from being maintained by a dwindling congregation supplemented by an annual grant from the Parish Meeting to becoming a business-like community asset. This is to move the village's only public building on to a sustainable business model;

In terms of addressing the Daniel family (and by extension our community) links with the Transatlantic Trafficking of Enslaved Africans (TTEA) trade and the compensation paid on its abolition, our project will:

- Interpret our community's irrefutable links with the Thomas Daniel, a Bristol Merchant who, at the time of the compensation payouts, proved that he owned in excess of 4,000 enslaved people;
- Create a venue that is accessible (in all meanings) and attractive for diverse communities to explore heritage and our wonderful natural environment;
- Create activities in tandem with Somerset's small, but important community of African Caribbean descent;

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<sup>34</sup> Wetland & Wildlife Trust [Steart Marshes | WWT](#)

<sup>35</sup> [www.somersetagents.org/talking-cafes](http://www.somersetagents.org/talking-cafes)

<sup>36</sup> Hinkley Point C – 1 mile from the church

- Create resources for schools and tertiary educational to enable study of the cross-cultural effects of the enslavement of people within the rural environment;
- Ensure the resources it creates are linked into go-to on-line resources for diverse audiences, not marooned in a parish website;
- Address the fact that life improved locally during the Daniel-family tenure;
- Address the issues of reconciliation and community reparations;
- Strengthen the organisation through partnerships and activities which will continue post project;

#### **Provisional project timetable:**

|                    |                                                                             |
|--------------------|-----------------------------------------------------------------------------|
| Early 2024         | Permission to start development project                                     |
| Feb – September    | Building repair and design surveys and decisions                            |
| October – March 25 | Faculty application                                                         |
| May                | Draft business, activity and interpretation plans                           |
| June               | Mid-term review and governance                                              |
| September          | Delivery Stage HF application – <u>End of this contract</u>                 |
| December           | Decision                                                                    |
| Jan - March 26     | Mobilisation and permission to start; appointment of Activities Coordinator |
| March – July       | Internal works – external and tower works continue until December           |
| September          | Main activity phase begins                                                  |
| December 28        | Project ends and final evaluation report                                    |

The programme has been worked up around the processes for achieving planning and fundraising. It is expected that the majority of the development for activities and interpretation will be undertaken during the first 12 months. The contractor will need to keep in touch with the project however to read and comment on drafts, attend the Heritage Fund Mid-term review and ensure that our final application documents reflect all relevant communities and ideas.

#### **Requirements**

The PCC is very clear that, although not a business, we need to operate in a business-like fashion, minimising waste, optimising resources and safeguarding our people, those who engage with us - and our reputation. It is also important that all our volunteers (from churchwardens and PCC members to those helping out occasionally) feel valued, feel respected – and have fun.

As client we will need to have full engagement with the business planning process in order to gain the learning that will be essential if we are to deliver the Business Plan successfully. The consultant we appoint will be able and willing to work collaboratively with us, at times playing a pedagogical, ‘hand-holding’ role, guiding us through the process and helping to develop our understanding, including of the technical construction of the plan.

Using the Development application Outline Business Plan as a starting point, we require the business planner to review the outline project proposals and take them forward to bottom out the capital programme and develop a detailed operational business plan as part of our Heritage Fund Delivery Stage application. We expect our business plan to include:

- Governance and Management
- Market analysis – to demonstrate that the markets we are targeting exist in sufficient numbers to sustain our business projections;
- Capital Project – Description of our capital project, including programme, cash-flow and risk;
- Operation analysis – Demonstrating how the NLHF investment will address our financial issues;
- Sustainability – Demonstrate how the investment will be sustained (and the audience/activities diversity maintained and developed) through a range of income-raising initiatives to enable the maintenance and management plan. This will include risk analysis and scenario planning to stress-test our proposals.

As an integral member of the team for this phase of our project, we expect the business planner:

- To undertake a review of existing documentation and interested parties;
- To attend relevant Project Board meetings in person or by Zoom;
- To keep watch on all aspects of project development in terms of risk, costs and future liabilities;
- To consider barriers to engagement and how these could be overcome;
- To consider the opportunities for enterprise and how best to develop and manage into the future;
- To participate in public consultation about the whole project (conservation, interpretation, activities) in open days;
- To feed into the Interpretation Designer and architect to ensure maintenance and durability are considered in the specification for materials and media;
- To work with the Activity Planner to ensure activities are suitably costed within our project budget and are sustainable in the long run;

- To liaise with the project team so that all plans reflect each other coherently;
- To assist with text for relevant sections of the application form;
- To assist with appropriate governance procedures within the PCC to ensure organisational understanding and buy-in for the Activity Plan;
- To write a Business Plan, reflecting NLHF outcomes, investment principles and our PCC vision.

The interpretation consultant will work closely with the Project Manager and write the Business Plan to meet Heritage Fund published guidance and any advice or feedback received.

#### **Appointment Timescale:**

Written proposals and fee proposals should be submitted to John McVerry, Project Manager electronically [john@heritageandcommunity.com](mailto:john@heritageandcommunity.com) by XXXXX. Upon appointment, the work will commence as soon as possible.

**The submission** (no longer than four pages of A4) should include:

- Details of the key personnel who will be carrying out the work and their relevant experience (CVs can be attached separately);
- Your proposed methodology and approach;
- Your fees showing a breakdown of costs (fees, expenses etc.)
- Payment schedule
- Evidence of PL/PI insurances
- Description of two recent relevant projects (as attachment if preferred) + referee contact details (2)

#### **Budget:**

The maximum fee available for interpretation is £10,000 to include travel and disbursements. The consultant should confirm whether or not they are VAT registered.

In accordance with our energy principles, it is expected that the adviser will minimise energy use wherever possible through using zoom and public transport. However, we acknowledge that this is not always possible in the rural environment.

Currently we envisage that in-person meetings will be required at start-up and up to five project meetings. Attendance will also be required at the HF Mid-term meeting and at any other HF meetings.

**Please contact** the project manager, John McVerry with any questions, clarifications and/or to arrange a site visit

[john@heritageandcommunity.com](mailto:john@heritageandcommunity.com) 01278 651064 07810 433916

Clarifications and points-raised will be shared with all applicants

## Background to our business development

Understanding that Stockland is a very small community, the project understood from the outset that it would need to work hard to sustain the Heritage Fund investment. This was not at odds in any way with the aspirations of the PCC, just on a different scale. From the outset we have searched for relevant, appropriate and realistic business partners beyond our parish boundaries, recognising that energy use particularly is a very real issue for many organisations in achieving sustainability.

We have identified our major business vulnerabilities as being:

- With the exception of our proposed p/t activities coordinator, Rector and contractors/consultants employed on a retained, or ad hoc basis, the operation will need to be managed, staffed and governed by volunteers;
- The community is too small to warrant 365 – day heating and lighting;
- The building needs to ‘rest’ using as little energy as is feasible, but be able to be readily awakened;
- All plant, systems and equipment need to be simple, robust and easily operated by a range of people;

In preparation for the project, we have come to some conclusions:

- It is more energy-efficient to heat people, rather than place;
- Regular activity sessions need to be set as ‘anchors’ for other groups to bunch around and benefit from heat etc;
- More events and activities will happen in the summer to reduce heat costs, but there must be a core of winter events as this is frequently the most isolating season for older residents;
- We will continue (through the development phase) to investigate a ‘consumer pays’ direct charging system for energy. This should prevent waste as well as reducing the bureaucratic load of booking and charging systems;
- With rapidly developing technologies, we will undertake in-the-round analysis of proposals before committing to current options;
- Keep it simple, keep it robust and let’s not be too clever.

## APPENDIX 2 – FUNDRAISING STRATEGY

### St Mary Magdalene, Stockland Bristol ... Parallel Pasts, Connected Futures

#### Draft Fundraising Strategy

This strategy follows the work achieved by West Huntspill and St Mary's Totnes (and others). It's purpose at this stage is to identify whether St Mary Magdalene, Stockland Bristol has a hope of achieving c.£250,000 as match funding for the HF application.

The major factor is the HPC Community Fund. They have supported us to achieve Expression of Interest and our round 1 application and have been up-front in recognising a level of embarrassment that Stockland was not included within the priority funding ring at the outset. They are also very conscious that Stockland has received very little from the fund and that we are going to ask them for a 'considerable' grant for the delivery. An additional factor is that the fund is set to cease c.2028 (but that might be extended due to the project overrun). The rumour is that there is in excess of £1m yet unspent. However, they were formally set up by central government and have no flexibility to ease application requirements. We have a good track record with them, having delivered both our previous projects on time and on budget – and have an impeccable reporting record. Conversations are on-going.

Aware that we are grade 2 and have a tiny population, we have been conservative in our speculation regarding the likelihood of our being attractive to funders and in terms of what we might expect to receive against their declared maximum. Each potential funder has been investigated to search for their average grant as well as their published range. An initial conversation with Valencia (Landfill) was very encouraging.

A consideration is that several large funds (National Churches Cornerstone, Garfield Weston, All Churches) require a substantial proportion of the funding to be secured before they will look at an application. This precludes securing grants before HF delivery application, but we need to talk to others as this would have crashed several projects that I know worked their way around.

Payment protocols are also on the agenda as we keep cashflow in mind, especially during the full-on capital phase. We are reassured by reports regarding HF's prompt payment. We are also eligible for the Diocese of Bath & Wells' facility for interest-free short-term loans to assist small parishes undertaking large projects with a complex funding structure.

Our current funding commitment (at delivery) is:

|                       |                                                                                   |
|-----------------------|-----------------------------------------------------------------------------------|
| LPW VAT Reclaim       | 296,520 – to be reviewed at developments stage as VAT situation is better defined |
| Large Grants          | 233,500                                                                           |
| Small grants          | 18,700                                                                            |
| Community fundraising | 5,000                                                                             |



Potential grants that look most likely from websites ... worked with West Huntspill, St Mary Totnes and others ...

| Grant body                      |   | Max                                | Likely | Programme  | Requirements    | Process | When/how    | Notes                                                                                                                   |
|---------------------------------|---|------------------------------------|--------|------------|-----------------|---------|-------------|-------------------------------------------------------------------------------------------------------------------------|
| HPC - Community Fund            |   | Meeting 24.10 to discuss potential |        | 4-months   | In discussion   | 2-stage | Up-front    | Regular reporting - logo - discussions planned late October on completion of 2023 grant.                                |
| Garfield Weston                 |   | 100,000                            | 40,000 | 4-months   | Faculty         | complex | Up-front    | 50% must be secured. Up to 10% of total                                                                                 |
| Valencia                        |   | 100,000                            | 50,000 | 4 months   | Faculty, tender | complex | on invoices | Heritage - not community. REALLY complex admin. Cf encouraging emails Nick Berry - 11.10.23 <b>10% seeding required</b> |
| National Churches - Cornerstone |   | 50,000                             | 50%?   | 3 x pa     |                 | Complex | ?           | Good fit ... Grade2 possible weakness - as is SW. 50% must be in place with >10k still to raise. 2 years to spend       |
| All Churches                    |   | 5,000                              | 5,000  | 3-6 months | LBC/Faculty     | Med     | ?           | Large grants for Project >£1m ... 30% already secured. Will do features (bells etc) some community facilities           |
| Foyle Foundation                | < | 10,000                             | 50%?   | ?          | ?               | Med     | ?           | Acquisition of knowledge ... WWT combo?                                                                                 |
| Laing                           |   | 20,000                             | 5,000  | 4 months   |                 | Brief   | invoice?    | Spend within a year of grant                                                                                            |
| Reaching communities            |   |                                    |        |            |                 |         |             | Needs specialist investigation - certain funding streams not eligible with HF                                           |
| Fairfield - 1124356             |   | 25,000                             | 5,000  |            |                 | letter  |             | Stockland super-eligible, but who knows? Very flaky and personal - gave huge grant to CCT for estate church             |
| Princes Countryside Fund        |   | 10,000                             | ?      |            |                 |         | up-front    |                                                                                                                         |

|                                |   |        |             |          |  |          |                            |                                                                                                                                                                      |
|--------------------------------|---|--------|-------------|----------|--|----------|----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Wolfson Foundation</b>      |   |        |             |          |  |          |                            |                                                                                                                                                                      |
|                                |   |        |             |          |  |          |                            |                                                                                                                                                                      |
| <b>Somerset Churches Trust</b> |   | 5,000  | 2,000       |          |  |          | On completion certificate. | Main fabric ... no organs or contents. 3-year membership requirement                                                                                                 |
| <b>Somerset CC</b>             |   |        |             |          |  |          |                            | No info available                                                                                                                                                    |
| <b>Bishop Radford</b>          |   | 3,000  | 1,000       |          |  |          |                            |                                                                                                                                                                      |
| <b>Joseph Rank</b>             |   | 20,000 | ?           | 3 x pa   |  | Med      |                            | Church Buildings                                                                                                                                                     |
| <b>Beaverbrook Foundation</b>  |   | 5,000  | 2,000       |          |  |          |                            |                                                                                                                                                                      |
| <b>Chas Hayward Foundation</b> |   | 7,000  | ?           | 3 months |  | 2 -stage |                            | Isolation & elderly                                                                                                                                                  |
| <b>Fisherbeck</b>              |   | 30,000 | ?           |          |  |          |                            | Environment & heritage                                                                                                                                               |
| <b>Bernard Sunley</b>          |   | 25,000 | av<br>5,000 |          |  |          |                            | For the elderly                                                                                                                                                      |
| <b>Sharpe Trust - BELLS</b>    | < | 500    | <500        |          |  |          |                            |                                                                                                                                                                      |
| <b>Idle Wilde</b>              | < | 500    | ?           |          |  |          |                            | Photo conservation?                                                                                                                                                  |
| <b>Foyle Foundation</b>        | < | 10,000 | 5,000       |          |  | letter   |                            | Digital                                                                                                                                                              |
|                                |   |        |             |          |  |          |                            |                                                                                                                                                                      |
| <b>Community</b>               |   | 2,000  | 5,000       |          |  |          |                            | PCC Committed to £2k for delivery. Community more useful as PCC needs to fundraise for Parish Share and usual commitments. £170 raised so far for development £1,000 |
|                                |   |        |             |          |  |          |                            |                                                                                                                                                                      |

## **APPENDIX 3 – OUTLINE STATEMENT OF NEED**

### **OUTLINE STATEMENT OF SIGNIFICANCE**

#### **St Mary Magdalene Church, Stockland Bristol**



Parish of Stockland, Quantock Deanery, Archdeaconry of Taunton

Listed Grade 2, Sedgemoor District Council

Church of England Church Heritage record 601532

Heritage at Risk Register record 1059049

Grid reference ST 24013 43620

### **SETTING**

The main part of the ecclesiastical parish of Stockland lies between Otterhampton and Stogursey, 9 km north-west of Bridgwater, with the remainder comprising several detached parts mostly to the east and north-east, including the hamlet of Steart, on the coast 4 km north-east of the village of Stockland Bristol. The south-west of the parish lies across a low ridge (30m) from which the land falls away to flat marshes in the north-east.



The village of Stockland Bristol is recorded in the Domesday Book. The 'Bristol' name was added in reference to its ownership by the Bristol Corporation from 1541 to 1839.

Much of the ground is clay overlying Blue Lias with pockets of limestone. Blue Lias is the primary building material for most of the older structures in the village, including the Church.

The village has a population of 140 with very few amenities beyond the church. Within the village is a care home for the elderly and a private social club, sited within the old village school. Much of the eastern parts of the parish lie within Steart Marshes, a nature reserve run by the Wildfowl and Wetlands Trust [WWT].

## DESCRIPTION AND HISTORICAL SUMMARY

The earlier parish church, dedicated to All Saints in 1316, was demolished and rebuilt in 1865 by Thomas Daniel (1799–1872), then lay rector and patron, at his own expense. Mr Daniel's father (also Thomas) was a sugar merchant and slave owner from Bristol, who, when slavery was abolished, received one of the largest compensation payments from the British Government. The monies his company received in 1834, in regard to around 4,500 enslaved people on 29 plantations throughout the West Indies, would be the equivalent today of nearly £11 million. In 1839, Thomas Daniel junior bought the estate of Stockland Bristol from the Bristol Corporation, which had owned it since 1541.

Thomas Daniel installed his son, the Revd Henry Arthur Daniel (1829–1912) as rector in 1857, which he held until 1883. The estate remained in family ownership until it was sold in the mid 1950s. There are no descendants of the Daniel family living in the local area.

The church was said to be by Arthur of Plymouth but has also been elsewhere attributed to TS Hack of Bristol and, following his death, to Godwin and Crisp. It was constructed in 1865 of blue lias, backed (largely) by bricks, with Bath stone dressing.

The building is in the English Decorated style. It comprises a chancel with south transept (containing pipe organ) and north vestry, a nave with north aisle and south porch, and a west tower. The tower is in three stages, with diagonal buttresses to the first and second stages, a parapet pierced with quatrefoil, and a stair turret. There is a clock dial on the east side. The church has tile roofs with bracketed eaves and copings with cruciform finials.



The interior of the church is plain, whitewashed plaster, with an arcade between the nave and north aisle on octagonal piers. The floor is tiled and there are wagon roofs in the nave and chancel, with a scissor braced roof to the north aisle. (cf Existing Floor Plan for photos of interior).

Original fittings from the earlier church include the 15<sup>th</sup> century font and fragments of the screen. The screen was restored and considerably enlarged in 1920 by F Bligh Bond. The remainder of the fittings are c1865, including catalogue pews. The east window of 1867 and two other stained-glass windows are by Clayton and Bell. The stone pulpit is constructed with 10 detached Purbeck shafts, and the reredos follows a similar design.

There are six bells only one of which, dated 1827, pre-date the rebuilding of the church. Two are from 1866, two from 1903 and the Treble from 1960.

Two war memorials on timber boards are fixed to the wall in the east end of the north aisle.

The church is situated in an open churchyard, which is accessed by 2 steps at the south west corner, and a steep flight of 8 steps at the east end. To the west of the churchyard is a dense spinney which is also part of the church grounds. The churchyard is surrounded by fields on two sides, leading down to the South West Coast path, 1 mile (by public footpath) to the north.

## MISSION AND MINISTRY



The current regular Sunday congregation (steady even post-Covid 19) is 11, with greater local engagement and attendance at Christmas and Easter. The churchyard is open and used for burials and interment of ashes. Consultation exercises during the early development stages of the project and discussions at the Village Meeting have revealed that the church is much valued as a place of peace and contemplation by villagers and visitors, including those using the South West Coast path and those visiting the WWT Steart Marshes reserve.

The church is leading the way in acknowledging and wrestling with its history, and the history of the village, in relation to slavery and colonialism.

The churchyard is managed with a view to encouraging wildlife and a diverse ecology (including greater horse-shoe bats, cowslips and orchids) whilst ministering to the needs of mourners.

## SIGNIFICANCE OF THE AREAS AFFECTED BY THE PROPOSALS

- *Removal of pews to open up the space in the north aisle.*  
The pews are not of significant architectural value.
- *Installation of toilet within vestry area at east end of north aisle.*  
Would require knocking through plastered, likely brick, interior wall of no decorative or historical significance.
- *Relocation of timber war memorials.*  
Would be easily accommodated on empty walls elsewhere in the building. Currently quite awkwardly placed, partly above pews.
- *Provision of kitchenette.*  
Keeping the kitchenette, toilets and free seating area all with the north aisle will preserve the atmosphere of the nave and particularly the chancel area and ensure that regular worship and occasional services are unaffected, and, indeed, enhanced with the possibility of refreshments afterwards and the provision of a toilet.

## IMPACT OF THE PROPOSALS

- Stockland Bristol has no public amenities beyond the church and the reordering proposals would provide the local community with an invaluable resource. Ongoing consultation and research have identified likely use of the space by the WWT (as an educational base) and local schools, using the church as a venue for history, RE and science (spinney area) field trips.
- We have current and potential links with professional mental health services, the local care home, CCS and Hinkley Point C chaplaincy and health centre and will seek to become a venue for wellbeing services within community and for neighbouring organisations.
- The provision of a toilet in the church will be a great asset, ensuring the building can be used for a variety of events and by everyone, as well as benefitting worshippers, particularly at occasional services.
- The kitchenette will mean that we can offer refreshments after worship and provide groups with the opportunity to serve refreshments at events/meetings.
- There is a keen interest in the local community with the reinstatement of the bells and a team of ringers will be a focus in village life and a blessing to the church.
- Acknowledgement, and ownership, not just of the church's history with the transatlantic slave economy, but that of the whole village demonstrates the reach of colonialism.



## APPENDIX 4 – OUTLINE STATEMENT OF NEED

### OUTLINE STATEMENT OF NEED

#### St Mary Magdalene Church, Stockland Bristol



Parish of Stockland, Quantock Deanery, Archdeaconry of Taunton

Listed Grade 2, Sedgemoor District Council

Church of England Church Heritage record 601532

Heritage at Risk Register record 1059049

Grid reference ST 24013 43620

***Please refer to the document SMB – 2023 Faculty Paper for background detail  
and for the Options Appraisal***

#### **Our needs**

We need to preserve and repair the grade 2 listed building, currently on the heritage at risk register, for continued worship and for community use.

We need to make the building more suitable for community use, including making some or all of the building a more heatable and hospitable space.

We need to enhance our churchyard, building on current good practice to write a management plan to increase biodiversity and link our environment to the WWT reserve 100m north of the church.

Otherwise without public buildings to address community spirit and offset isolation, we need to enable continued and enhanced community engagement with the building, such as café gatherings, bell ringing and care of the churchyard.

We need to acknowledge and interpret the history of both the church and the village and particularly its relationship to the slave economy and the 1834 compensation.

### **The proposals**

We propose to undertake significant necessary repairs to the building to preserve it and abate further deterioration, particularly repairs to the tower, rectifying the swelling blue lias gables and rectifying previous unfortunate cementitious mortar repairs.

We propose to reorder the north aisle, including screening off this area, to provide a heatable and hospitable space for community use.

We propose to install an accessible toilet and kitchenette area.

We propose to rehang the bells and recreate the Stockland Peal.

We propose to address and interpret the heritage of the church and village with a permanent display on-site alongside on-line presence, particularly considering its relationship to the slave economy.

In due course, we further propose to improve disabled access to the building by providing a ramped access to the churchyard.

### **Why now?**

The church is on the heritage at risk register and needs significant repair work if it is not to deteriorate further. Successive quinquennial reports have identified urgent repairs required that, without major funding, are beyond the resources of the PCC and so a scheme of work for which funding applications can be made needed to be produced.

The building is not currently able to be used easily or comfortably by the community in Stockland, who have no other public buildings. It is essentially unheatable, and filled with catalogue pews, the vast majority of which are unused apart from the odd large funeral (once every three years or so).

There is a strong feeling of support in the local community for the preservation of the church and its wider use by villagers and beyond, as evidenced by consultation that began in 2018 and continues through regular engagement with the monthly Parish Meeting and discussion with local groups, including WWT (Stearth Marshes), local primary and secondary schools, bellringers, mental health advocates, Village Agents etc.

The history of the church and village, especially regarding the Daniel family's involvement with the transatlantic slave economy, is particularly pertinent given the national conversation on this subject, and has placed us in a locally unique position to lead and educate on this subject. We are in discussion with, amongst others, Somerset African Caribbean Network, Diocese of Bath and Wells, Bristol academics and the Wells Transatlantic Slavery Project. We are also arranging to consult with Bath Abbey and Bristol Cathedral regarding the work undertaken in those settings to address their history regarding slavery.



*We are aware that to apply for faculty at this stage of project preparation is unusual. The decision has been made in order to tie in the faculty processes and decision with National Heritage Lottery Fund programmes and to maximise our chances of funding success by minimising risks/uncertainties that might put funders off working with us.*

*We know that there are many details to be worked through to build up the faculties necessary to undertake the project, but these are key stop/go issues that can take place before final detailing is in place.*

## APPENDIX 5 – A3 VERSIONS OF TIMETABLES AND RISK SCHEDULES

## Development Programme

[illegible]

## Delivery Programme

[illegible]

## Development Risks

| St Mary Magdalene, Stockland Bristol - Development risks |                    |                                                                                                                        | Key: Probability                                                                                               |             |        | Key: Impact                      |                                                                                                                                                                                                                                                                                                                                                        |                |
|----------------------------------------------------------|--------------------|------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|-------------|--------|----------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
|                                                          |                    |                                                                                                                        | 1 = highly unlikely                                                                                            |             |        | 1 = negligible impact to outcome |                                                                                                                                                                                                                                                                                                                                                        |                |
| Risk Register                                            |                    |                                                                                                                        | 2 = unlikely                                                                                                   |             |        | 2 = minor impact                 |                                                                                                                                                                                                                                                                                                                                                        |                |
| Stockland Bristol Development Risks                      |                    |                                                                                                                        | 3 = possible                                                                                                   |             |        | 3 = of concern                   |                                                                                                                                                                                                                                                                                                                                                        |                |
|                                                          |                    |                                                                                                                        | 4 = probably                                                                                                   |             |        | 4 = must be addressed            |                                                                                                                                                                                                                                                                                                                                                        |                |
|                                                          |                    |                                                                                                                        | 5 = very likely                                                                                                |             |        | 5 = showstopper                  |                                                                                                                                                                                                                                                                                                                                                        |                |
| Ref                                                      | Area               | Risk                                                                                                                   | Impact                                                                                                         | Probability | Impact | Risk value                       | Mitigations                                                                                                                                                                                                                                                                                                                                            | Risk owner     |
|                                                          | Construction       | Conservation costs grow exponentially                                                                                  | Project becomes poor VFM for HF                                                                                | 3           | 4      | 12                               | Development funding has been included for detailed exploration of the tower masonry. Prior to R1, careful observation, QS and high % contingency were included. Additional Match-funding could be sought, but not desirable                                                                                                                            | PM Architect   |
|                                                          | Construction       | Situation is worse than we expect on opening-up, requiring further survey work                                         | Delays and cost                                                                                                | 2           | 4      | 8                                | Surveys have been undertaken already and knowledge of our church makes us confident. There is contingency in Dev stage if additional work is required                                                                                                                                                                                                  | Architect      |
|                                                          | Construction       | We fail to achieve Faculty                                                                                             | Delay and cost                                                                                                 | 2           | 4      | 8                                | We have secured in-principle support from the DAC for the major re-ordering points. HE is not anticipating difficulties and there is nothing currently contentious and no issues are expected. Detailed faculty and list B proposals will be worked up early in the development phase and we will enter multiple faculty applications to mitigate risk | Architect      |
|                                                          | Construction       | Scope creep: requirements increase as time progresses                                                                  | Costs rise, delays incurred etc                                                                                | 2           | 4      | 8                                | Capital building project and interpretation scoped and (we hope) finalised. Any additions will be outside the project unless they threaten the integrity of the proposals                                                                                                                                                                              | PM             |
|                                                          | Business plan      | Economic downturn ... exploration shows our current business projection to be over optimistic                          | Current business case assumptions prove incorrect                                                              | 3           | 3      | 9                                | Our current business plan is robust, conservative and will be stress-tested at development stage and reviewed at delivery. Business aspirations are modest in order to be achievable.                                                                                                                                                                  | PM             |
|                                                          | Professional team  | Contracting company becomes insolvent or lost through other reasons (Architect, Interpretation, business and activity) | All work on that element of the planning stops                                                                 | 3           | 4      | 12                               | Robust procurement process to include viability of company as criterion; smaller contracts can be re-let quickly.                                                                                                                                                                                                                                      | Architect & PM |
|                                                          | PCC & project team | Key team members fall ill, move away or have to resign                                                                 | Project loses direction and momentum                                                                           | 3           | 4      | 12                               | The team is lean, but backed-up and professionally supported; nothing rests solely in the lap of one person.                                                                                                                                                                                                                                           | PM             |
|                                                          | Resources/capacity | Internal resources insufficient to cope with project demands                                                           | Deadlines missed,; activity plan delayed, HF reporting delayed, funding draw down delayed information missing; | 3           | 4      | 12                               | Separation of tasks has been agreed by members that they can cope with demands; all critical processes have back-up; Advance planning when input required; all key players have undertaken to see the project through                                                                                                                                  | PM             |
|                                                          | Reputational       | Failure to submit delivery application                                                                                 | Loss of grant                                                                                                  | 1           | 5      | 5                                | Experienced team; good project management; realistically planned, timed and costed project                                                                                                                                                                                                                                                             | PM             |
|                                                          | Activity Plan      | Fail to attract sufficient potential delivery partners for specifically aimed activities                               | Project fails to hit HF and PCC strategic objectives                                                           | 1           | 4      | 4                                | We would spread our net further to find partners. All indications through consultation so far are that this will not                                                                                                                                                                                                                                   | PM             |
|                                                          | Activity Plan      | Fail to attract people for activities                                                                                  |                                                                                                                | 2           | 4      | 8                                | Each currently proposed activity has been worked up through consultation and co-created with a proposed delivery partner.                                                                                                                                                                                                                              | PM             |
|                                                          | Finance            | Change in Gov't policy loses VAT reclaim under Listed Places of Worship Scheme                                         | 20% rise in costs                                                                                              | 3           | 5      | 15                               | Unlikely during this project, but not in our control; will affect entire sector                                                                                                                                                                                                                                                                        | PM             |
|                                                          | Finance            | Over-run of development phase causes us to miss 12-month window to claim development VAT through LPW scheme            | 20% rise in costs                                                                                              | 3           | 4      | 12                               | Programme is a major focus for the delivery period                                                                                                                                                                                                                                                                                                     | PM             |
|                                                          | Finance            | We fail to secure match Funding                                                                                        | costs, delay and reputational damage                                                                           | 3           | 5      | 15                               | We have a realistic strategy and realistic targets. We are continuing to work on the fundraising and will continue throughout                                                                                                                                                                                                                          | SP             |
|                                                          | Political          | Election, or other event puts HF into purdah                                                                           | Development phase - and consequently entire project - is put back                                              | 4           | 4      | 16                               | Beyond our control, but action can be taken asap if possibility becomes likelihood                                                                                                                                                                                                                                                                     | PM             |

Delivery Risks

|                                                       |                     |                                                                                            |                                                                                                                                    |             |        |            |                                                                                                                                                                                                                                                                                                                |                                  |              |  |
|-------------------------------------------------------|---------------------|--------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|-------------|--------|------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------|--------------|--|
| St Mary Magdalene, Stockland Bristol - Delivery risks |                     |                                                                                            | Key: Probability                                                                                                                   |             |        |            |                                                                                                                                                                                                                                                                                                                | Key: Impact                      |              |  |
|                                                       |                     |                                                                                            | 1 = highly unlikely                                                                                                                |             |        |            |                                                                                                                                                                                                                                                                                                                | 1 = negligible impact to outcome |              |  |
| Risk Register                                         |                     |                                                                                            | 2 = unlikely                                                                                                                       |             |        |            |                                                                                                                                                                                                                                                                                                                | 2 = minor impact                 |              |  |
|                                                       |                     |                                                                                            | 3 = possible                                                                                                                       |             |        |            |                                                                                                                                                                                                                                                                                                                | 3 = of concern                   |              |  |
|                                                       |                     |                                                                                            | 4 = probably                                                                                                                       |             |        |            |                                                                                                                                                                                                                                                                                                                | 4 = must be addressed            |              |  |
|                                                       |                     |                                                                                            | 5 = very likely                                                                                                                    |             |        |            |                                                                                                                                                                                                                                                                                                                | 5 = showstopper                  |              |  |
| Ref                                                   | Area                | Risk                                                                                       | Impact                                                                                                                             | Probability | Impact | Risk value | Mitigations                                                                                                                                                                                                                                                                                                    |                                  | Risk owner   |  |
|                                                       | Construction        | Conservation works encounter unforeseen difficulties                                       | Conservation delayed and costs rise                                                                                                | 2           | 4      | 8          | Work was done at development stage to ensure knowledge of the conservation requirements and to achieve cost certainty. Sufficient levels of contingency are included; Procurement of construction company with sufficient experience of similar projects;                                                      |                                  | PM Architect |  |
|                                                       | Construction        | Situation is worse than we expect on opening-up                                            | Delays and cost                                                                                                                    | 2           | 4      | 8          | Extensive surveys have been undertaken and knowledge of our church makes us confident.                                                                                                                                                                                                                         |                                  | Architect    |  |
|                                                       | Construction        | Discover unknown archaeology                                                               | Delay and cost                                                                                                                     | 2           | 5      | 10         | As much pre-survey as possible has already been done. There will be an archaeologist on-site                                                                                                                                                                                                                   |                                  | Architect    |  |
|                                                       | Cost                | Inflation is greater than predicted                                                        | Costs rise and value engineering is required                                                                                       | 3           | 4      | 12         | Our calculations have been thorough; we will monitor closely; prepare to VE on items that can be picked up later and are not critical to conservation or business plan; decent contingency;                                                                                                                    |                                  | PM Architect |  |
|                                                       | Cost                | Economic downturn                                                                          | Business case assumptions prove incorrect                                                                                          | 3           | 3      | 9          | Ensure business plan is robust, conservative and will be stress-tested at development stage and reviewed at delivery                                                                                                                                                                                           |                                  | PM           |  |
|                                                       | Cost                | Change in Gov't policy loses VAT exemption                                                 | 20% rise in costs                                                                                                                  | 2           | 5      | 10         | Unlikely during this project, but not in our control; will affect entire sector                                                                                                                                                                                                                                |                                  | PM           |  |
|                                                       | Design requirements | Scope creep: requirements increase as time progresses                                      | Costs rise, delays incurred etc                                                                                                    | 2           | 4      | 8          | Capital building project and interpretation scoped and finalised. Any additions will be outside the project                                                                                                                                                                                                    |                                  | PM           |  |
|                                                       | Construction        | Contractor company becomes insolvent                                                       | All work stops                                                                                                                     | 3           | 4      | 12         | Robust procurement process to include viability of company as criterion; only robust companies have been invited to tender                                                                                                                                                                                     |                                  | Architect    |  |
|                                                       | Reputational        | Failure to deliver project                                                                 | Loss of grant                                                                                                                      | 1           | 5      | 5          | Experienced team; good project management; realistically planned, timed and costed project                                                                                                                                                                                                                     |                                  | PM           |  |
|                                                       | Activity Plan       | Fail to attract activity coordinator of sufficient quality                                 | Delivery is dependant on the energy and ability of the activity co-ordinator                                                       | 3           | 4      | 12         | The role has been carefully designed (and remunerated) to attract a decent range of applications. Team members are well connected with the sector. The geography of the project still leaves a vulnerability.                                                                                                  |                                  | PM           |  |
|                                                       | Activity Plan       | Fail to attract sufficient volunteers                                                      | Delivery is dependant on volunteer support                                                                                         | 3           | 4      | 12         | We intend to spread our net further; we will recruit an activities co-ordinator who will focus on recruiting and training volunteers                                                                                                                                                                           |                                  | PM           |  |
|                                                       | Activity Plan       | Proposed delivery partnerships fall through                                                | Delivery is dependant on partnership delivery as community is too small and not sufficiently diverse to find audiences internally. | 2           | 4      | 8          | We have linked with a range of strong and diverse locally connected organisations as prospective partners. There are others in reserve should a relationship (or partner organisation) fail                                                                                                                    |                                  | PM           |  |
|                                                       | Activity Plan       | Fail to attract people for activities                                                      | Fail to deliver our activity plan                                                                                                  | 2           | 4      | 8          | Each activity has been worked up through consultation and co-created with a proposed delivery partner.                                                                                                                                                                                                         |                                  | PM           |  |
|                                                       | Activity Plan       | We lose expected delivery partners through organisations closing etc                       | Weakens our achievements on our strategic objectives                                                                               | 2           | 4      | 8          | Each activity has been worked up through consultation and co-created with a proposed delivery partner. We have a list of potential back-up delivery partners                                                                                                                                                   |                                  | PM           |  |
|                                                       | Activity Plan       | We fail to recruit and sustain the campanology group                                       | Weakens our achievements on our strategic objectives                                                                               | 2           | 4      | 8          | much work has been done on promoting the idea of ringing bells - convivial fitness and fun. We will recruit in earnest from the development stage and create programme to ensure retention                                                                                                                     |                                  | PM           |  |
|                                                       | Resources           | Internal resources insufficient to cope with project demands                               | Deadlines missed;; activity plan delayed, HLF reporting delayed, funding draw down delayed information missing;                    | 3           | 4      | 12         | Separation of tasks has been agreed by members that they can cope with demands; all critical processes have back-up; Advance planning when input required; all key players have undertaken to see the project through                                                                                          |                                  | PM           |  |
|                                                       | Infrastructure      | Broadband is inadequate or village power supply fails. Mobile signals remain non-existent. | Church becomes inoperable and interpretation/donations falter                                                                      | 3           | 4      | 12         | The parish meeting and elected members continue to pressure Airband to meet its obligations re broadband. We might need to install a satellite system if fibre still not here by project delivery. Pressure continues to be put on utilities companies to make improvements as electrical supply is maxed-out. |                                  | PM           |  |
|                                                       | Political           | Election, or other event, puts HF into purdah                                              | Permission to start - and consequently entire project - is put back. Loss of Dev't VAT reclaim                                     | 3           | 4      | 12         | Beyond our control, but action can be taken asap if possibility becomes likelihood                                                                                                                                                                                                                             |                                  | PM           |  |
|                                                       | Political           | Culture wars                                                                               | Community gets caught up in vitriol and loses confidence                                                                           | 3           | 5      | 15         | We are not planning wide social media presence and protocols will be drawn up to protect volunteers handling communications                                                                                                                                                                                    |                                  | PM           |  |

## Legacy Risks

| St Mary Magdalene, Stockland Bristol - post delivery risks |                |                                                                                                                | Key: Probability                                                               |             |        | Key: Impact                      |                                                                                                                                                                                                                                                                                                                                                                                                      |            |
|------------------------------------------------------------|----------------|----------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------|-------------|--------|----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| Risk Register                                              |                |                                                                                                                | 1 = highly unlikely                                                            |             |        | 1 = negligible impact to outcome |                                                                                                                                                                                                                                                                                                                                                                                                      |            |
|                                                            |                |                                                                                                                | 2 = unlikely                                                                   |             |        | 2 = minor impact                 |                                                                                                                                                                                                                                                                                                                                                                                                      |            |
|                                                            |                |                                                                                                                | 3 = possible                                                                   |             |        | 3 = of concern                   |                                                                                                                                                                                                                                                                                                                                                                                                      |            |
|                                                            |                |                                                                                                                | 4 = probably                                                                   |             |        | 4 = must be addressed            |                                                                                                                                                                                                                                                                                                                                                                                                      |            |
|                                                            |                |                                                                                                                | 5 = very likely                                                                |             |        | 5 = showstopper                  |                                                                                                                                                                                                                                                                                                                                                                                                      |            |
| Ref                                                        | Area           | Risk                                                                                                           | Impact                                                                         | Probability | Impact | Risk value                       | Mitigations                                                                                                                                                                                                                                                                                                                                                                                          | Risk owner |
|                                                            | Financial      | Business case assumptions prove incorrect                                                                      | Revenue is not generated according to business case                            | 3           | 4      | 12                               | Ongoing review of assumptions<br>Timely modifications to budgets and forecasts if appropriate; Marketing strategy included in Business Plan; Business planning will continue to be realistic/conservative; proactive response to perceived changes                                                                                                                                                   | Treasurer  |
|                                                            | Sustainability | Almost immediately upon completion of this project another critical area of need is found                      | Unable to continue activities or generate income                               | 1           | 4      | 4                                | We are confident that we know about our likely needs and will be embarked on phase 2 before the end of this project. Management & maintenance needs are embedded in the business plan and the next critical repairs are already known. The next project (the roof) will already be in train before the end of the project, with activities to build on (and embellish) the successes of the project. | PCC        |
|                                                            | Sustainability | We fail to attract and retain sufficient volunteers                                                            | It becomes impossible to open the church and run activities                    | 2           | 5      | 10                               | All incomers to the village will be inducted to the project and every effort will be made from the start to ensure succession and participation                                                                                                                                                                                                                                                      | PCC        |
|                                                            | Reputational   | The end result of project fails to live up to expectations - visitor and concert numbers (and income) declines | Loss of confidence;<br>Loss of support from Patrons, Friends, congregation etc | 2           | 4      | 8                                | Our business plan addresses the most vulnerable elements of our operation                                                                                                                                                                                                                                                                                                                            | PCC        |
|                                                            | Governance     | Interest wanes as people's connection with religious practice declines                                         | Membership and volunteer numbers decline                                       | 3           | 5      | 15                               | The aim of the project is to reinforce and formalise that the church is a community asset, owned by and run by community members regardless of their religious practices or affiliations                                                                                                                                                                                                             | PCC        |
|                                                            | Resources      | Internal resources insufficient to cope with project demands                                                   | We become unable to continue the activity programme beyond the project         | 3           | 4      | 12                               | Engaging with delivery partners will keep momentum and key initiatives going; and succession planning for PCC will embrace the need for heritage and visitor experience/skills.                                                                                                                                                                                                                      | PCC        |