

St Dubricius Church Porlock - Porlock InSpired Project

Fundraising strategy (revised 5th August 2025)

Our Governance body, the PCC, formed a fundraising sub-committee in 2019 to investigate funding options for our building conservation project. This Project is of a scale and complexity that it is hard to envisage it being successfully achieved without the support of the National Lottery Heritage Fund. We know of no other funders who would be willing to underwrite a substantial portion of the project costs to enable others to also come on board.

We planned our campaign by initially bringing the project to the attention, and engaging with, our local community. The £18,000 raised to date has enabled us to cover the costs of structural surveys and other professional fees, mainly Architects and our Activities consultant, to fund work needed to get the project to the Heritage Fund Development Phase application submission.

We were encouraged by the response from the Heritage Fund to our February 2023 Expression of Interest and their invitation to us to submit an application. Our Development Phase application was submitted in February 2024, and was successful, being awarded a grant of £179,335. The current plan is to submit the Delivery Phase Application in February 2026, with the option to delay to May 2026 if necessary.

The Heritage Fund typically offer 85- 90% funding for a Delivery Phase. Alongside our potential Heritage Fund Delivery grant, we set ourselves the target of £100,000 to raise in match funding. The Heritage Fund's attention to detail is so widely recognised, that most potential match-funders use a project's progression through their process as reassurance of good planning, effective management, governance and legal compliance. Having the Development phase funding approved gave us confidence that other funders would consider us more favourably.

A professional fundraiser was appointed in May 2025, according to the Heritage Fund tendering protocol, to bring in additional expertise to help us raise the match-funding. Applying to potential match funders before a successful development phase is well under way, and long in advance of the Delivery Phase, was felt to be counterproductive, as some providers have time limits on using the funds as well as reduction for subsequent funding applications. Our intention is to secure all necessary match-funding requirements by the time the Heritage Fund considers our delivery application, or at least by the time of submission of our Permission to start request.

Preparation of a short-list of potential trusts and foundations for grants was started very early in our preparation process to determine that the target of £100,000 was not unreasonable. The resultant table is included as Appendix 1. We compiled the list of potential donors from Diocesan suggestions, the recent experience of other similar Heritage Lottery projects we have established contact with, and our own research.

When our Development Phase application was submitted in February 2024 it was expected that the majority of the VAT that would be incurred during the project (approx. £200,000) would be recovered as grants from the LPW Grants Scheme, as the majority of the expenditure is for repair works. However the 2025 budget decision by the government to restrict the VAT recovery to £25,000 per church per year means there is now a potential funding shortfall of £150,000 - £175,000. Our fundraiser has advised that it is highly unlikely that this additional sum can be raised even by an extended fundraising

campaign. The Heritage Fund have indicated that they are highly unlikely to be able to cover all of the shortfall. Their willingness to offer any uplift will be dependent on us being able to demonstrate that we have done our best to maximise our contribution to the project funding. We will meanwhile continue our local fundraising initiatives.

Our fundraiser has now updated and extended the list of potential funders, and the amounts that might reasonably be expected to be sought from each, and applied a typical success rate. That table is attached as appendix 2. She has also prepared a Fundraising Review, attached as appendix 2, which includes a summary of the funders table, examines in more detail the prospects for raising the initial £100,000 target funds, and discusses options for contributing towards the new shortfall caused by the VAT scheme changes. Grant application submissions is planned to commence shortly.

Match funding will come from our volunteer hours and we will also, if required, consider any temporary loans as a cash-flow option, but not as capital funding. We understand there is a Diocesan scheme available to offer loans to assist cashflow for large church projects. A final fundraising effort is planned for near the end of the project to top up our promised funds. This will be through community fundraising, pledges and crowd funding as needed.

Appendix 1

Porlock Inspired Match-Giving Providers search results at February 2024			
Grant Provider's name	Grant potential	Match Funding/ Information	Comments
Garfield West Foundation	£30,000	grants tend to be 10%- 20% of total project cost.	Eligible for request < £100k. "No greater than £30k". Cannot apply again within 1 year of application. garfieldweston.org
Benefact Group formerly Allchurches.co uk	£15,000	Our £ req'd contribution - secure 30% of our total project costs	Fund repairs & conservation. Online application. "We do not have deadlines for receiving applications; we deal with them as they come in. 2 year interval between applying". benefacttrust.co.uk
The Wolfson Foundation	£10,000	Ambiguous information.via the National Churches Trust website as say "works costing £20,000 to £80,000"	From 2020 grants made by the Wolfson Foundation to churches will be awarded by the National Churches Trust. Grants will be awarded towards essential fabric repairs at churches in England. These grants are usually up to £10,000 and are offered in partnership with the Wolfson Foundation. Historic places of worship can apply for a Wolfson grant via the National Churches Trust's Medium and Large grant programmes (depending on the size of the project). Nationalchurchestrust.org
Pilgrim Trust	£15,000		preservation and conservation of historic buildings. Only apply if not eligible for National Churches Trust or Church Buildings Council. thepilgrimtrust.org.uk
Bernard Sunley Charitable Foundation	£15,000		Local community/ church repairs. raise the quality of life, particularly for those who are young, disadvantaged or elderly.
ChurchCare	£5,000		Grants for historic church interiors. Do not think will do spire. churchcare.co.uk
Leche Trust	£5,000		Conservation grants only. Applications should be made in writing via post or email. There is useful information on the Trust's website in how to apply. lechetrust.org
Beaverbrook Foundation	£5,000		Applications are only accepted from registered charities (St. Dubricius is exempt from registration!) beaverbrookfoundation.org
G F Eyre Charitable Trust	£3,000		Support Heritage and community projects. apply in writing to Exeter

Somerset Churches Trust	£1,500		£1,500 to £2,000. 3 year interval for applying, an application form is available to download from the website. somersetchurchestrust.org
Dorothy Whitney Elmhirst Trust	£1,000		Heritage, Environment & conservation. Local charity, Information from Charity Commission charity number 1064069
Frognall Trust	£1,000		Church conservation projects. Apply in writing Alexandra House , St. Johns Street, Salisbury, Wiltshire, SP1 2SB
Total	£106,500		
Hinkley Point : small grants programme	£5,000		Small grants programme. Currently doubtful we would be eligible as we are not in the immediate catchment area, but the fund is under review as geographical spread is a possibility. hpcfunds.co.uk
HPC Community Fund Open Grants Programme	£5,000	Doubtful we would be eligible	It is a 2 stage process. Currently doubtful we would be eligible as we are not in the immediate catchment area, but the fund under review as geographical spread is a possibility. Contact for an initial discussion and/or submit a 200 word outline of your project/need as advice can also be given as to which funding strand best suits your requirements from the 4 options available. hpcfunds.co.uk
The Ashfords Foundation	£5,000	Does not meet our objectives	Small capital projects or expenditure to help organisations deliver activities and that support local communities. ashfordsfoundation.org.uk
Belsize charitable Trust No 1	£6,000	Do not think we are eligible	Conservation. Heritage. Apply in writing
Exmoor National Park Authority			ENPA Partnership Fund no longer have Community grants available (Jan 24)
Headley Trust			"The Headley Trust no longer funds medieval, rural parish churches in England and Wales. The last grants from the Headley Trust Parish Church budget were made in October. https://www.sfct.org.uk/the-headley-trust/
Viridor/ Entrust			Landfill communities Fund. They do not fund with 10 miles of Porlock postcode area.

Appendix 2

Porlock InSpired Fundraising Review

1. Executive Summary

The following document sets out an analysis of the trust research to date, estimate of costs for fundraising and recommendations for next steps for the Porlock Inspired capital campaign.

The total project cost is estimated to be £1.5m and in the NLHF application it was proposed that £100,000 would be raised towards the overall cost in matched funding. Due to changes in the Listed Places of Worship scheme, there is now an additional shortfall of up to £200,000. In November 2025, there will be a mid-term review with NLHF and at this meeting, an uplift will be requested, however it is estimated that there will likely be an additional c.£50K - £75K to raise. It is assumed the NLHF will provide a response in December 2025 – January 2026, and it is then that the final figure to be raised in matched funding will be known.

It is hoped that a Stage 2 application can be submitted to NLHF in February 2026 which would require all matched funding to be raised by June 2026. The two year development phase time limit means the application could be deferred to May 2026, if necessary, with matched funding ideally secured by August 2026 and certainly before requesting permission to start in around October 2026.

2. Fundraising from Trusts & Foundations

Please refer to the Trust Pipeline for a list of prospects.

Trust prospect research has been undertaken utilising consultants' own knowledge of capital, Christian and local funders, Stage 1 NLHF application, Bath & Wells Diocesan prospects list, Cornerstone database, competitor analysis (East Harptree and West Huntspill Church funders) and other online resources including National Churches Trust and Somerset Churches Trust websites.

36 trusts and foundations have been identified, where eligibility looks likely. A further two strong leads have been identified but we are currently ineligible to apply to these Trusts as the PCC is not a registered charity. The total amount which might be requested from likely eligible trusts is between £133,500 (the total minimum ask) and £261,500 (the total target ask). It is worth noting that not all approaches will be successful. The proportion of successful applications is usually between 10% and 40% and depends on how well-aligned projects and applications are with funders' charitable giving objectives and criteria.

Fundraising is at its most competitive ever and trust fundraising has become very challenging in recent years. The Association of Charitable Foundations recently reported grant applications had increased by around 30% to Trusts last year. One of the UK's largest trusts, the Esmée Fairbairn Foundation has published success rates for 2024, showing only 7% of applications were successful last year (c.1 in 14 applications were successful). My personal trust fundraising success rate for the last financial year was 41% (1 in 2.4).

Only 19 of the 36 identified trusts have an open grant application process so many applications will be speculative. Hence, it is increasingly helpful to have connections to Trust boards. It is recommended, therefore, that a network-mapping exercise be undertaken to see if and where connections can be made to any of the trusts (including those with open grant rounds). This will involve the Trust pipeline being shared with PCC members (and congregation if desired), to see if

there are any personal connections to Trusts. Where there are personal connections, contact should be made to ask if the Trust contact would be an advocate for the project and provide a steer on the grant amount to be sought.

To understand what might be achieved from trust fundraising, we can create a gift table. The gift table below draws on the current pipeline to demonstrate how many grants we would need to secure at different amounts, and the possible prospects for each tier. Here we have assumed a success rate of 1 in 4 which is optimistic in the current climate. As we can see, we are below the required number of prospects in all tiers, indicating 17 more prospects need to be found. Assuming more research had been carried out and the gift table was populated with the required number of prospects, it indicates a total trust income of £103,000 could be achieved. It is important to note that also included in the pipeline and gift chart are two trusts which could fund conservation work to the Reredos and Triptych. However, permission is still being sought to commence work on restoration of these decorative features, so it may not be possible for applications to be submitted to these two trusts at the present time.

Prior to undertaking the research, it was hoped that a landfill tax funder and a few of the larger funders could offer opportunities to bid for six-figure grants, but investigations have revealed that none are available. Furthermore, other trusts were found that would support church developments which included elements of expanding community facilities such as a kitchen or toilets, but which would not fund structural repairs alone (e.g. Laing Family Trusts, Joseph Rank Trust). A significant local source of funding, the Hinkley Point C Community Fund, available through the Somerset Community Foundation, was also investigated but we were told an application from Porlock would be seen as a lower priority and 'not one you may want to spend time and resource applying for'.

Gift size	No. of gifts required	No. of prospects required (assuming 1:4 hit rate)	Total	Names of prospects
£25,000	1	4	£25,000	Garfield Weston Foundation, Sackler Trust +2
£15,000	2	8	£30,000	Benefact Trust, National Churches Trust, Bernard Sunley Foundation, Fairfield Charitable Trust, Vinehill Trust +3
£10,000	2	8	£20,000	Wolfson Foundation, Charles Skey Charitable Trust, Dorothy Whitney Elmhirst Trust, Clark Foundation, Hodge Foundation +3
£5,000	4	16	£20,000	Ian M Foulerton Charitable Trust, 29th May 1961 Charitable Trust, John Horseman Trust, Somerset Community Foundation, Tufton Charitable Trust, Church Union, Fyrish Foundation, Ross Russell Trust, St. Andrew's Conservation Trust, King Charles III Charitable Trust, Aurelius Charitable Trust +5
£2,000	4	16	£8,000	Somerset Churches Trust, Jill and Norman Franklin Trust, Gladiator Trust, Exmoor National Park, Lord Barnby's Foundation, G F Eyre Charitable Trust, Sabina Sutherland Charitable Trust, Leonard Laity Stoate Trust, Saddlers' Company Charitable Fund, Froggnal Trust, Porlock Parish Council, Battens Charitable Trust +4
Total	13	52	£103,000	

Based on the prospect research carried out to date the gift table demonstrates that around 52 applications would need to be made to raise £103,000.

Five days have been spent researching trusts so the well-known larger funders are very likely represented in the pipeline. It will be harder to find more trusts granting £10,000 and over than smaller trusts, so it is likely many more smaller trusts will need to be found to make up for the lack of prospects in the upper tiers. It is estimated three to four days of further research may be required to find the number of additional prospects required.

For this reason, it is recommended that the PCC considers registering as a charity so that applications can be made to the two trusts already identified as strong leads, Medlock Charitable Trust and Hobson Charity, which only fund registered charities and together could be worth c.£25,000.

Areas which can be further explored in prospect research include trusts which fund activities for young people and older people, as well as other local and Christian funders. There is also likely to be funders for the capital works to improve environmental sustainability, the solar panels and glass doors for the porch, but these works require permission and until this is granted it will likely hinder the submission of related applications.

3. The investment

The table below gives an indication of time required for bid writing:

Application size	Indicative days per application
Large e.g. Garfield Weston (10 pages)	4 to 5 days
Typical e.g. 2 to 5 page application	1 to 2 days
5 to 8 applications per day of small two page proposals (due to lack of other application guidance)	1 day

Bid writing and prospect research is charged at £400 per day.

It is estimated that 52 applications could take approximately 36 days of bid writing, but each application is different and tailored where appropriate so this is a rough guide.

As an estimate, it would likely take around 24 days of bid writing to submit the currently identified 36 prospects.

At present, the Fundraising Consultant is contracted for a total of 30 days until the end of 2025, and during this time it is estimated there will be around 17 days for bid writing.

It is important to note that trust fundraising can take considerable time and outcomes from applications can take between three to nine months to be known from submission.

4. The Shortfall

If a further c£50,000 needed to be raised, the gift chart can be amended as follows:

Gift size	No. of gifts required	No. of prospects required (assuming 1:4 hit rate)	Total	Names of prospects
£25,000	1	4	£25,000	Garfield Weston Foundation, Sackler Trust +2
£15,000	2	8	£30,000	Benefact Trust, National Churches Trust, Bernard Sunley Foundation, Fairfield Charitable Trust, Vinehill Trust +3
£10,000	3	12	£30,000	Wolfson Foundation, Charles Skey Charitable Trust, Dorothy Whitney Elmhirst Trust, Clark Foundation, Hodge Foundation +7
£5,000	8	32	£40,000	Ian M Foulerton Charitable Trust, 29th May 1961 Charitable Trust, John Horseman Trust, Somerset Community Foundation, Tufton Charitable Trust, Church Union, Fyrish Foundation, Ross Russell Trust, St. Andrew's Conservation Trust, King Charles III Charitable Trust, Aurelius Charitable Trust +21
£2,000	13	52	£26,000	Somerset Churches Trust, Jill and Norman Franklin Trust, Gladiator Trust, Exmoor National Park, Lord Barnby's Foundation, G F Eyre Charitable Trust, Sabina Sutherland Charitable Trust, Leonard Laity Stoate Trust, Saddlers' Company Charitable Fund, Frogmal Trust, Porlock Parish Council, Battens Charitable Trust +40
Total	27	108	£151,000	

The gift table demonstrates that around 108 applications would need to be made to raise £151,000. In order to do this, an additional 73 prospects would need to be found (including the 17 additional prospects that need to be found to raise £103,000). As a rough estimate this would require an additional ten days of prospect research and an additional 20 days of bid writing.

However, it is unlikely that we will find another 7 prospects able to give £10,000 and another 21 offering grants of £5,000 but until further research is carried out, it won't be known how many other higher level prospects can be found.

What is clear is that the return on trust fundraising investment will diminish, as the larger grant applications will be submitted up front. Whilst I am confident £100,000 could be achieved through trusts, it may be a struggle to raise significantly more. We should therefore consider alternative income streams.

5. Alternate income streams

Major Donors: Major donor fundraising involves making bespoke requests to wealthy individuals. The process for undertaking major donor fundraising from scratch usually involves: updating the charity's Privacy Policy, informing data subjects of the update, sending data subject's personal data (name and address) to a third party for wealth screening, analysis the returned data for wealthy prospects, network mapping with Trustees, warming up prospects

and making bespoke approaches to donors. It is generally a fairly lengthy process which can take 9 months or so. The PCC has indicated there are unlikely to be many Major Donors in the locality. An analysis of previous community fundraising donor data may give us an indication of whether there may be any potential Major Donors (e.g. if anyone has previously donated £500 or more). Because this campaign requires funding to be raised in a relatively short amount of time, and Major Donor fundraising would take significant investment and time, it is not advised as an income stream for this project.

However, it is advised that a face-to-face meeting is sought with an appropriate contact at Somerset Community Foundation at St Dubricius Church (preferably with a cream tea!). Somerset Community Foundation appears on the prospect trust pipeline but they are a valuable organisation beyond the grant that has been identified. They manage relationships with wealthy individuals in Somerset who hold funds with the foundation. After visiting the church and learning of the campaign they may be able to make introductions to certain fundholders (or discuss the project on our behalf), who may be willing to support the campaign.

Corporate: As part of this scoping exercise, a number of local corporates have been approached, including: National Grid (Hinkley Connection Project) (Porlock is outside of eligible area), Agratas (Tata Group's global battery business at the Gravity Campus near Bridgewater) (no response) and Nuclear Restoration Services (formerly Magnox) (currently considering our eligibility but have indicated Porlock is outside the boundary for funding). No other corporate prospects have been researched but given the rural nature of the locality, and the relatively poor return on corporate fundraising, this is unlikely to be a lucrative income stream. Despite the lack of success to date here, it may be useful to demonstrate to the NLHF (in future conversations around the uplift) that attempts have been made to reach out to the corporate community.

Community: £18,000 was successfully raised from the community which effectively kick-started the campaign, so the PCC has a history of successful community fundraising. Community appeals are often implemented towards the end of capital campaigns to 'top up' funding from trusts and other sources in order to meet the final target. It is strongly recommended that the PCC once again engages in community fundraising in order to help meet an anticipated shortfall. Does the PCC have regular givers it could ask to increase their monthly donations for a limited time until the end of the campaign to support the project? No doubt Porlock attracts visitors during the summer and some will visit the church, so consider investing in signage about the campaign and contactless donation points. Consider a Christmas appeal, or a fundraising event on St Dubricius' feast day of 14th November. Can St Dubricius First School become involved in a fundraising campaign? Are there other local community organisations which might support the campaign? The time limited nature of the appeal with such a large lottery grant as a 'prize' could make for a compelling campaign: e.g. 'we have five months to raise £30,000 to unlock £1.5 million from the National Lottery to save our community church'.

6. Recommendation

Once the Case for Support has been created, priority should be given to submitting the trust applications to the prospects already identified in the pipeline. With additional contracted days, it is anticipated that most, if not all, the applications can be submitted by the end of the calendar year. Thereafter a second wave of trust research and bid writing could be undertaken. The Fundraising Consultant has been pencil booked for a further 30 days and this could be delivered between November 2024 and March 2026.

Given the time it can take to get outcomes from submitted bids, and that the PCC needs to embark on a community fundraising campaign, it is advised that the Stage 2 NLHF bid is submitted in May 2026 to allow time to raise funds including the anticipated shortfall.

July 2025, Katie Clementson-Lee