

Business Plan, Development Appraisal and Valuation Consultant

Period of contract: Development and Delivery Phase - RIBA 1 to RIBA 7;



**Invitation to Tender (ITT)
for
St Osyth Priory and Parish Trust
Business Plan, Development Appraisal and Valuation
Consultant**

Submission of Tenders: 25th July 2025, 5pm

Any queries relating to this tender should be submitted via the
St Osyth Priory and Parish Trust email - tenders@stosythpriorytrust.org.uk

Issue date: 3rd July 2025



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1.0 PROJECT OVERVIEW AND CONTEXT

1.1 INTRODUCTION

St. Osyth Priory and Parish Trust is currently in the development phase of a National Lottery Heritage Fund which will focus on the redevelopment of the Tithe Barn and Old Dairy and into hireable event and community spaces.

St Osyth Priory and Parish Trust wishes to appoint a suitably qualified and highly experienced Business Planning, Development Appraisal and Valuation Consultant to work on the Development and Delivery Phases - RIBA 1 to RIBA 7 of this aspect of the project.

This ITT sets out the background to the project, the tender process, timescales and management arrangements.

There is, however, no guarantee that Delivery Phase services will be required, and bidders should take account of this.

The Trust are also looking to appoint a Evaluation, Economic and Social impact Consultant, and would welcome submissions from those interested in both opportunities.

1.2 BACKGROUND INFORMATION

St. Osyth Abbey (originally and still commonly known as St. Osyth Priory) was a house of Augustinian canons in the parish of St. Osyth (then named Chich) in Essex, England in use from the 12th to 16th centuries. Prior to the Reformation, it was the third wealthiest abbey in the country. After falling into private ownership by the Darcy family following the reformation, the abbey was severely damaged in the English Civil War, and the house and 6,800-acre estate was owned privately throughout its history.

The house was requisitioned during the Second World War and then sold in 1948 to the Loyal and Ancient Order of Shepherds who founded a convalescent home here. Five parts of the priory are Grade I listed buildings. In 1954 Mr Somerset de Chair, a popular novelist and MP, purchased the property, allowing the convalescent home to remain in the main building for many years (closed 1980), and converting the Gatehouse into a separate residence. De Chair developed the gardens and opened the property to the public. He also gradually sold off parts of the estate and allowed large scale gravel extraction to disfigure much of the surrounding landscape. After his marriage in 1974 to Lady Juliet Wentworth Fitzwilliam, the Wentworth Woodhouse art collection, which she had inherited, was displayed here. On de Chair's death in 1995 the property was put up for sale by his widow, and it was eventually purchased by the present owners, the Sargeant family, in 1999. It is part of the Historic Houses Association but is privately owned by the Sargeant family.

The site is used for events, open for walking tours, and there is an existing education and training centre.

St. Osyth Priory is an exceptional collection of heritage assets comprising 16 separate Grade I, II* and II listed buildings set within a Grade II registered historic park and garden. The vision for this mesmerising collection of buildings and landscape, is to fully revitalise and restore the historic assets to their former glory. By utilising many different options, the estate will have a new long term and viable future that engages with the community and brings new economic prosperity to the local area. The vision is that the Tithe Barn and Old Dairy buildings will deliver a wedding and venue that can be leased and potentially run by a private operator - with the buildings used by the community to meet the Trusts charitable purposes when not rented out commercially.

1.3 PROGRAMME TIMELINE

Below is an approximate timeline of the programme:

RIBA Stage 2 – July 2025 – December 2025

1. Pre-planning Application Submitted – September 2025 to November 2025
2. Ongoing SOPPT Meetings

RIBA Stage 3 – December 2025 – August 2026

1. Coordinated Designs & costs Approved – May 2026
2. Match Funding for Delivery Phased secured and in place, agreements in place - May 2026 to August 2026
3. Planning/LBC Applications – April 2026 – May 2026
4. Delivery Phase Application Prepared – June 2026 – July 2026
5. Delivery Phase Application Submitted - August 2026
6. Planning/LBC Decision – TBC
7. Ongoing SOPPT Meetings

End of Development Phase

RIBA Stage 4 – January 2027 to June 2027

1. Decision on Delivery Phase Application – December 2026 (TBC)
2. Estimated Permission to Start Received (Delivery Phase) – January 2027
3. Discharge Pre-Commencement Planning/LBC conditions – February 2027 to May 2027
4. Ongoing SOPPT Meetings

RIBA Stage 5 – November 2027 to January 2029

1. Construction - December 2027 to October 2028
2. Fit out and interpretation installation period – November 2028 to January 2029
3. Ongoing SOPPT Meetings

RIBA Stage 6 Handover of sites & testing for close out – January 2029 – March 2029

1. Ongoing SOPPT Meetings

RIBA Stage 7 In use and open for Autumn - March 2029 – May 2029

1. Ongoing SOPPT Meetings
2. Project Evaluation Submitted - March 2029 to May 2029
3. Activity period and programme ends – May 2029

2.0 REQUIRED SERVICES

2.1 BUSINESS PLAN CONSULTANT

2.1.1 Role, Scope and Responsibilities

The Business Planning Consultant will be required to work with the Project Team towards the development and successful completion of the National Lottery Heritage Fund Delivery Phase Application in 2026. The Business Planning Consultant will work with St Osyth Priory and Parish Trust and other consultants to research, understand, model and present the financial and other business matters of the project.

The Business Plan will look at the market for the Tithe Barn and Old Dairy project and detail revenue, governance, management and staffing implications, as well as assess risk, for the project outcomes. The Plan will need to include organisational and financial models that will support a sustainable delivery of the project. This will include the potential for income generated through retail, employment, catering and possibly accommodation opportunities on the site. The Business Plan will be in compliance with the 2019 National Lottery Heritage Fund guidance (Strategic Framework 5).

We anticipate the Business Planner will liaise with key stakeholders including the incumbent operator for weddings and events:

- To research, understand and prepare a Business Plan & Development Appraisal for the Tithe Barn and Old Dairy project that adheres to current National Lottery Heritage Fund guidance;
- To understand the current marketplace and potential and target markets as part of the market appraisal
- To detail the management, governance, staffing and volunteering structure necessary to deliver the project outcomes;
- To undertake any events, retail and catering planning;
- To support the Client Project Director in developing match funding applications;
- To develop a sustainable revenue statement that has clearly evidenced assumptions, based on sensitivity and competitor analysis;
- To produce a forecast project income and expenditure account and a forecast project cash flow statement;
- To assess risk for the development and operation of the project;
- To assess the impact of the project on the wider organisation;
- To undertake stakeholder consultation as required;
- To provide an updated Valuation Report in line with National Lottery Heritage Fund Development Appraisal guidance;
- To liaise with the wider project team and fully participate in the project development;
- Prepare a RIBA 3 level presentation for the National Lottery Heritage Fund mid development phase review;
- To set up all job descriptions, detailed action plans for delivering the project and operational planning;
- To make recommendations on skills gaps and incorporate training needs into the project delivery phase;
- Keep full and proper records of all meetings and negotiations conducted in connection with this work;
- Work closely with stakeholders, the Project Board and staff at the National Lottery Heritage Fund and attend all application advice workshops as necessary;
- Any other items appropriate to the position and grade.

The Valuation report should conform to RICS Valuation – Professional Standards (the 'Red Book') in order that they are accepted as evidence of value by the National Lottery Heritage Fund. These figures are key to the development of a Conservation Deficit calculation, and a supporting Viability Appraisal for the project.

The National Lottery Heritage Fund expects that as the appointed valuer, you will have a minimum of five years' experience as a RICS qualified valuer in order to undertake this brief.

The Valuation report should present a clear and concise valuation report detailing the property's market value based on income generation. The report should include a comprehensive analysis of the property, rental market research, financial projections, comparable market analysis, and the valuation methodology employed.

The Valuation may be completed by a third party.

2.2 SCHEDULE OF SERVICES

2.2.1 Development Phase

The following services are expected:

- Consultants are required to work in partnership with the Client to build on the existing Outline Business Plan, and help answer the following key questions:
 - What is the existing status of the organisation and the current policy context?
 - What is the strategic context across all relevant themes?
 - What is the socio-economic context and the audiences for the site?
 - What is the market context in terms of the local, regional and international markets and how they relate to proposed and existing services provided?
 - Who are the key comparator organisations and how do they compare?
 - What are the lessons learnt from comparator organisations that can be translated to the project?
 - What is the audience development context and how does this relate to the Activity Plan for the project?
 - What is the Strategic Development Plan for the organisation, including aims and objectives going forward?
 - What are the future visitor number projections, including the calculation basis?
 - What is the capacity analysis for the future?
 - What is the income generation potential of the site, what pricing policies can be developed?
 - What are the future expenditure assumptions for the site?
 - How can a sustainable business model be developed?
 - What is the sensitivity analysis for the business model?
 - What are the key risks to the business case and how can these be mitigated?
- Advise on process of marketing St Osyth Priory and Parish Trust;
- Look at current income and expenditure levels of St Osyth Priory and Parish Trust, and develop a strategic plan for improvements;
- Consider key visitor flow routes, flow rates, staffing and commercial response needs in respect of the site;
- Consider the future staffing options, approaches and responses in close consultation with the Client and other key consultants;
- SWOT analysis with Client Teams and key stakeholders;
- Undertake a full market appraisal for the site, involving a wide range of qualitative and quantitative methods and exploring the market breakdown and context;
- Analysis of competitors and local need for spaces for hire;
- Consultation and engagement with operator;
- Collaborate with the Activity Planning consultant who will provide information on existing visitor numbers;
- Forecast the future income and expenditure projections from operator and space hire for 10 years post completion;

- Undertake a full financial appraisal of the project, examining, analysing and producing:
 - The existing financial health check
 - Ten-year income projections
 - Ten-year expenditure projections
 - Ten-year financial plan
 - Robust and fully tested sensitivity analysis
 - Key milestones within the financial plan.
- Develop a comprehensive risk assessment for the Business Plan and identify mitigating measures across the proposed activities;
- Prepare a fully integrated Business Plan compliant with National Lottery Heritage Fund requirements <https://www.heritagefund.org.uk/funding/good-practice-guidance/business-plan>;
- Feed findings into 10-year Maintenance and Management Plan and SOPPT Activity Plan (documents to be shared upon approval on contract);
- Undertake a Development Appraisal and Conservation Deficit Appraisal with the QS to National Lottery Heritage Guidelines <https://www.heritagefund.org.uk/funding/heritage-enterprise/appraisals>;
- Prepare or otherwise commission a property valuation for Heritage Enterprise by a RICS qualified surveyor in accordance with HM Treasury Red Book Guidance.

2.2.2 Delivery Phase (subject to successful funding)

The following services are expected:

- Business Plan implementation consultancy;
 - Setting clear objectives: Defining specific, measurable goals that align with the overall business strategy.
 - Resource allocation: Ensuring that financial, human, and technological resources are appropriately distributed to support the plan.
 - Timeline management: Creating a detailed timeline with milestones to track progress and ensure timely completion of tasks.
 - Risk management: Identifying potential risks and developing mitigation strategies to address them proactively.
 - Performance monitoring: Regularly reviewing progress against objectives and making necessary adjustments to stay on track.
- Testing and Quality checking;
 - Conducting tests: Performing tests to validate the effectiveness and efficiency of the plan's components.
 - Quality assurance: Implementing quality control measures to ensure that all deliverables meet the required standards.
 - Feedback integration: Collecting feedback from stakeholders and making necessary improvements based on their input.
- Oversight of recruitment of project staff, supporting the Board of Trustees;
- Marketing support and delivery, including but not limited to;
 - Market research: Conducting research to understand the target audience, market trends, and competitive landscape.
 - Marketing plan development: Creating a comprehensive marketing plan that outlines objectives, strategies, and tactics.
 - Campaign execution: Implementing marketing campaigns across various channels, such as social media, email, and traditional media.
 - Performance analysis: Tracking the effectiveness of marketing efforts and making data-driven decisions to optimize future campaigns.

3.0 INSTRUCTIONS FOR TENDERING

3.1 GENERAL TENDERING INFORMATION

- 3.1.1 These instructions are designed to ensure that all Tenderers are given equal and fair consideration. It is important therefore that you provide all information asked for in the format and order specified in the tender documents. If you have any doubt as to what is required or will have difficulty in providing the information requested, please submit a question via tenders@stosythpriorytrust.org.uk
- 3.1.2 St Osyth Priory and Parish Trust reserves the right to contact and take up references. Tenderers are required to provide details of three references for work of similar scale and nature in the ITT submission.
- 3.1.3 Tenders shall be submitted in accordance with these instructions.
- 3.1.4 Tenders that do not comply with any mandatory requirement (i.e. where the words “shall” or “must” are used) will be rejected.
- 3.1.5 This ITT does not constitute an offer and St Osyth Priory and Parish Trust does not undertake to accept any tender. St Osyth Priory & Parish Trust reserves the right to accept a Tender in part, rather than in full.
- 3.1.6 Whilst the information contained in this ITT is believed to be correct at the time of issue neither St Osyth Priory & Parish Trust, nor its advisors, will accept any liability for its accuracy, adequacy or completeness nor will any express or implied warranty be given. This exclusion extends to liability in relation to any statement, opinion or conclusion contained in or any omission from this ITT (including its appendices) and in respect of any other written or oral communication transmitted (or otherwise available) to any Tenderer. This exclusion does not extend to any fraudulent misrepresentation made by or on behalf of St Osyth Priory & Parish Trust.

3.2 CONFIDENTIAL NATURE OF TENDER DOCUMENTATION

- 3.2.1 Documentation in relation to this Invitation to Tender and any Tenders received by St Osyth Priory & Parish Trust in response to it shall be treated as a private and confidential save where the disclosure is required by law.
- 3.2.2 Other than with professional advisers or sub-contractors that need to be consulted with regards to the preparation of the Tender, Tenderers shall not:
 - a) Disclose that they have been invited to tender;
 - b) Discuss the Invitation or the Tender they intend to make;
 - c) Release any information relating to the ITT and/or the Tender that they intend to make;
 - d) Devise or amend the content of their Tender in accordance with any agreement or arrangement with any other organisation and/or person, other than in good faith with an organisation and/or person who is a proposed partner, supplier, consortium member or provider of finance;
 - e) Enter into any agreement or arrangement with any other organisation and/or person, other than in good faith with an organisation and/or person who is a proposed partner, supplier, consortium member, or provider of finance;

- f) Enter into any agreement or arrangement with any other organisation and/or person that has the effect of prohibiting or excluding that person from submitting a Tender;
- g) Canvas directly or indirectly with any other Tenderer, Member or Officer of St Osyth Priory and Parish Trust (including its consultants and contractors) in relation to this procurement;
- h) Attempt to obtain information from any of the employees or agents of St Osyth Priory and Parish Trust or their advisors concerning another Tenderer or Tender;
- i) Pass the ITT documents to any other organisation.

3.2.3 If a Tenderer does not observe the points above, St Osyth Priory and Parish Trust will reject their tender and may decide not to invite the Tenderer to tender for future work.

3.2.4 St Osyth Priory & Parish Trust will consider only bona fide bids, which do not refer to any other bid. It shall be entitled to disqualify any application where collusive bidding is suspected.

3.3 CONDITIONS

3.3.1 St Osyth Priory and Parish Trust is not liable by way of contract, for any work undertaken or cost incurred by any respondent in connection with the preparation, submission or assessment of any tender. The Tenderer is responsible for independently checking and satisfying himself/herself of the accuracy of the information provided in this brief.

3.3.2 St Osyth Priory and Parish Trust reserves the right to retain all submission material, including that prepared for presentation purposes, and display or otherwise utilise the material as it may consider appropriate, at no cost to them.

3.3.3 Subject to satisfactory performance and funding being secured for the Delivery Phase, the Project Management and Cost Consultant team will also be commissioned through this tender to manage the implementation of all landscape and building works in the Delivery Phase. **There is, however, no guarantee that delivery stage services will be required, and bidders should take account of this.**

3.4 COMMUNICATION AND QUESTIONS

3.4.1 All formal communications (including, but not limited to, clarification questions, appointments for site visits and the submission of Tenders) to St .Osyth Priory and Parish Trust are to be made in writing using tenders@stosythprioryandparishtrust.org

3.4.2 It is the Tenderer's responsibility to ensure any verbal queries or clarifications they generate are confirmed in writing via email. In the event of any misunderstandings reliance on verbal communications will not be permissible.

3.4.3 If a Tenderer is in doubt as to the interpretation of any part of the ITT, or if they consider that any of its requirements are ambiguous or conflict with any other requirements, they should contact St Osyth Priory and Parish Trust via email.

3.4.4 No representation, explanation or statement made to the Tenderer or anyone else by or on behalf, or purportedly on behalf of St Osyth Priory & Parish Trust as to the meaning of the Tender documents, or otherwise in explanation as aforesaid, shall be binding on St Osyth Priory and Parish Trust in the exercise of its obligations under a subsequently awarded contract.

3.4.5 Should any Tenderer wish to clarify the interpretation of any part of the ITT requirements, they may submit clarification questions via email system. This opportunity exists until the deadline of 6th May

after which no undertaking is given to reply. St Osyth Priory & Parish Trust will use their best endeavours to respond as a matter of assistance to the Tenderer, but it shall not be construed to add to, modify or take away from the meaning and intent of the proposed contract and/or the obligations and liabilities of the Tenderer. Tenderers' messages are managed in standard business hours only, Monday to Friday.

- 3.4.6 Where an enquiry is beneficial to all Tenderers, both an anonymised copy of the clarification question and the response will be communicated to all Tenderers. If a Tenderer wishes St Osyth Priory & Parish Trust to treat a clarification as confidential and not issue a response to all Tenderers it must state this when submitting the clarification question. If, in the opinion of St Osyth Priory & Parish Trust, the clarification is not confidential, St Osyth Priory & Parish Trust will inform the Tenderer, and the Tenderer will have an opportunity to withdraw it. If the clarification is not withdrawn, both the question and response will be sent to other Tenderers anonymously.
- 3.4.7 St Osyth Priory and Parish Trust reserves the right (but shall not be obliged) to seek clarification of any aspect of a Tender during the evaluation phase where necessary for the purposes of carrying out a fair evaluation. Tenderers are asked to respond to such requests promptly.

3.5 EVALUATION CRITERIA

- 3.5.1 The final contract award will be to the Most Economically Advantageous Tender. The tender evaluation criteria will be based on a combination of Quality and Price which has been specified and weighted in the table below.
- 3.5.2 Once all evaluations have been completed St Osyth Priory and Parish Trust will add the quality and price scores together to provide a total score for each Tenderer. The Tenderer with the highest total score will be recommended to deliver the service.

Criteria		Weighting
Quality - 70%		
1	3 x relevant examples of experience (delivering NLHF Business Plans)	35%
2	Key Project Personnel	20%
3	Project Execution and social value	15%
Price - 30%		
	Cost Proposals	30%
Total		100%

3.6 TENDER CONTENTS AND SCORING METHODOLOGY

3.6.1 What to include

For additional guidance for how St Osyth Priory and Parish Trust would like you to respond, please see the recommendations below. Responses should be sent as an emailed PDF attachment.

1. **Case Studies.** To showcase yourself and/or your organisation, please include case studies covering the elements of the Role, Scope and Responsibilities as well as the schedule of services; this helps to demonstrate clearly how your previous experience contributes to your value proposition.

- 2. Bios and CVs.** In addition to this, providing an overview of your proposed team's individual bios, their responsibilities and brief examples of relevant past work is necessary to demonstrate how well you are suited to delivering the proposed works.
- 3. Community and Stakeholder Engagement.** St Osyth Priory & Parish Trust is an organisation that works with, and across, a number of varied stakeholders. Please outline how you would engage those stakeholders in this project.
- 4. Methodology and Timeline.** In addition, please provide a methodology, timeline & order of outputs. Tell us how you would propose delivering against the brief, and why.
- 5. References.** Please provide three referees' details and a description of similar contracts delivered over the past five years.
- 6. Insurance.** Please confirm that you have:
 - a. Employer's liability insurance
 - b. £5m Professional indemnity insurance, for each and every claim
 - c. £5m Public liability insurance

Proof of insurance will be required from the successful bidder.

- 7. Social Value.** Finally, to strengthen your response further still, please provide examples of your social value.

3.6.2 Scoring

ITT – Quality (70%)

This element equates to 70% of the full mark and the scoring of each element of the requirement will use the scoring system as shown in table below.

Method Statements Question	Scoring Range	Weighting
Relevant examples of experience	0 to 5	35%
Project Personnel	0 to 5	20%
Project execution and social value	0 to 5	15%

The following scoring mechanism will be used to score the quality method statements responses:

Score	Rationale/Judgment	General Description
0	The response fails to comply with the requirements of this ITT or is otherwise incapable of evaluation.	Wholly unsatisfactory
1	The response does not demonstrate an understanding of St Osyth's Priory's requirements as defined in this ITT and is incomplete or is otherwise unconvincing in significant respects.	Unsatisfactory
2	The response demonstrates only a limited understanding of St Osyth Priory and Parish Trust's requirements as defined in this ITT, lacks detail or is not convincing in a some respects	Cause for concern
3	The response demonstrates an understanding of, and compliance with St Osyth Priory and Parish Trust's requirements as defined in this ITT.	Acceptable
4	The response indicates that the bidder would effectively deliver the project in accordance with St Osyth Priory and Parish Trust's requirements. The response is convincing, detailed and demonstrates a good understanding of St Osyth Priory & Parish Trust's requirements as defined in this ITT.	Good
5	The response indicates that the bidder would effectively deliver the project in accordance with St Osyth Priory & Parish Trust's requirements. The response is entirely convincing, highly detailed and demonstrates a complete understanding of and compliance with St Osyth Priory & Parish Trust's requirements as defined in this ITT.	Excellent

In order to ensure that the successful Tenderer has met minimum quality standards, any Tenderer whose score includes two or more answers that are awarded a score of 2 or less, or any awarded of a score of 0, will be deemed to have failed minimum quality standards and will be deselected from the tender process.

ITT – Price (30%)

The pricing schedules submitted will be worth 30% of the overall marks.

Please provide a breakdown for both the Development Phase and the Delivery Phase.

There is, however, no guarantee that Delivery Phase services will be required, and bidders should take account of this.

The Tenderer with the lowest price will receive the maximum points available.

Each remaining Tenderers' price will be awarded a score based on the percentage difference between their price and that of the most competitive price:

Score = Lowest Tender Sum / Contractors Tender sum x Max. Weighted Available Score

Please see an illustrated example of the calculation methodology below for clarity:

Tenderer A	Tenderer B	Tenderer C	Tenderer D
15,849	17,094	25,497	31,246
30%	27.81%	18.65%	15.22%

A = 15,849 and gets 30%

A divided by B = 15,849/17,094 = 0.92

Proportional score 30 x 0.927 = 27.81%

3.7 INTERVIEWS / PRESENTATIONS

- 3.7.1 As part of the tender evaluation process bidders may be required to make a presentation or attend an interview online. Bidders will be notified as soon as possible if they are required to give a presentation or attend an interview. Following the presentations /interviews the scores attained in the written submission may be moderated.

3.8 INDICATIVE PROCUREMENT TIMETABLE

- 3.8.1 Below is a table of indicative timescales for the procurement process. Please note that some of these dates may be subject to change. As time is of the essence for this project, only contractors who can meet the timetable set out below should submit a tender for this service contract.

MILESTONE	TARGET DATE
Invitation to Tender (ITT) available online	3 rd July 2025
Formal Site Visits	Upon request, subject to availability but not essential
Deadline for receipt of ITT Clarification Questions	9 th July 2025
Tender returns: ITT Submission Deadline	25 th July 2025, 5pm
Tender Evaluation Period and clarification meeting (if required)	w/c 28 th July 2025
Confirmation of appointment	w/c 4 th August 2025

- 3.8.2 The above dates are for guidance only and may be amended by written notice by and at the sole discretion of St Osyth Priory and Parish Trust.
- 3.8.3 By submitting a tender for the provision of the Services a Tenderer confirms that it is able to meet the dates above including the provision of all necessary personnel, facilities and information to deliver the Services.

Appendix I: Business Plan



ST OSYTH PRIORY & PARISH TRUST

PAST PRESERVED: BUILDING A SUSTAINABLE FUTURE THROUGH RESTORATION

PROJECT BUSINESS PLAN - 2024 - 2028

FEBRUARY 2024

	NAME	SIGNATURE	DATE
PREPARED BY	Jane Beattie Tricolor Associates	<i>JHBeattie</i>	25.02.24
REVIEWED BY	Michelle Behr SOPPT	<i>Michelle Behr</i>	27.02.24
APPROVED BY	Conrad Payne SOPPT	<i>Conrad Payne</i>	27.02.24

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1. EXECUTIVE SUMMARY

1.1 Overview

This business plan has been prepared to provide the St Osyth Priory & Parish Trust (referred to at times within this document for ease as SOPPT) with a clear and transparent project and operational road map to deliver the restoration of the Tithe Barn and Old Dairy and stabilisation works to the associated Cart Lodge.

Importantly, it delivers a model that will generate long-term financial sustainability, and allow the Trust to extend their work and, through future lease agreements with the Sargeant Family as the St Osyth Priory Estate freeholders, to conserve and protect other historic buildings on the listed Priory precincts, including the Abbot's Tower and the full restoration of the Cart Lodge at a later phase.

It is important to note that, while a standalone road map for the focus of the Trust, this business plan needs to be considered alongside, and as an appendix to, the main business plan for the entirety of the St Osyth site.

This is included in the Appendices, and is a key document. Produced in 2019 by the Sargeant Family, with an overview from SOPPT, and in liaison with Tendring District Council and other Stakeholders, its main purposes were to:

1. Set out along with the salient history the delivery strategy for the agreed 'vision' that will (based on detailed Options Appraisals) see St Osyth Priory Estate run on a commercial basis comprising: A Functions and Accommodation Offering; A Visitor Attraction; A Holiday Cottages Offering
2. To bring back into long term viable use the Heritage Assets at St Osyth Priory identified by the Council within the 14th March 2018 s106 agreement, seeking to achieve the Council's goal of maximising public access and simultaneously addressing the site's Conservation Deficit
3. To deliver the complete restoration of:
 - a. Darcy House; The Gatehouse (completion of works); Abbot's Tower, Chapel and 'Rivers Wall'; Brewhouse; West Barn; Tithe Barn, Cart Lodge and Old Dairy; Rose Garden Walls; Crenellated Wall, before considering in the longer-term, delivery of other assets that are lesser graded but significant in their own right.

1.2 Key Aims

The St Osyth Priory site in Essex represents 1300 years of British history, from Anglo-Saxon times to the present; signifying continuity, endurance, and significance.

With this important heritage designated by Historic England's Heritage at Risk Register (HAR), through the project that is the focus of this business plan, the St Osyth Priory & Parish Trust aims to preserve and rejuvenate the Grade II* listed Tithe Barn, and the Grade

II listed Old Dairy - undertaking stabilisation works to the associated Grade II Cart Lodge until the next phase of restoration - creating an opportunity not only for preservation but also revitalising community connection to its history.

The Trust, existing to support ***“The Preservation for the benefit of the public of the buildings, monuments and land of particular historical, architectural or construction interest...at St Osyth Priory ...”*** seeks to create a self-sustaining model that ensures the long-term preservation of these heritage buildings while promoting community engagement and economic development.

A programme of capital works will repair and sympathetically convert the buildings into a space for the community and for delivery of educational programming and skills building, while also driving commercial income through alternate use via hire to an operator as a wedding and celebration venue that will underpin the delivery of the Trust’s charitable purposes.

1.3 Alignment with Wider Opportunities

The project creates the wider opportunity for impactful, heritage-led regeneration that delivers economic, environmental and social impacts to Jaywick, Clacton and the wider Tendring area - one of the most economically and socially deprived areas in the country. The project will rebuild connection to the Priory that has been lost through 30 years of public closure, with activities targeting local needs including lack of aspiration, mental health and isolation that are exacerbated by poor transport links, few social spaces, and limited employment pathways.

The Tendring area faces many challenges when it comes to accessing heritage for people of all ages, including transport links, socio-economic or educational attainment. It is important that these barriers to accessing heritage are overcome so the benefits of visiting St. Osyth Priory can be felt by all.

Building on our existing successful education programme, planned activities will broaden reach, enhance inclusion, participation, heritage awareness, and organisational sustainability through targeted research, consultations, partnerships, and volunteer engagement strategies. They include interactive site features, family-friendly activities, animated films, volunteer recruitment, ongoing staff and volunteer training, school sessions, wellbeing programs, and community events. We are committed to reducing the carbon impact of the capital works programme.

Programming will help to mitigate and limit environmental impact and bring about positive behaviour change from a young age. The 200 acres of Registered Park & Gardens provide the green spaces for the community which are an essential part of wellbeing and creating a positive environment and building pride in place.

The project aligns with other local strategies and will promote Tendring’s tourism, cultural and heritage offers. Much of the area’s heritage tourist attractions are currently focused in Harwich and Walton-on-the-Naze. This project will build on the work of Heritage Lottery Funded project ‘Resorting to the Coast’, that celebrates and shares the seaside heritage of Tendring, particularly Clacton-on-Sea and Jaywick Sands, along with the Jaywick Martello Tower, to create an attractive hub of heritage assets in the local area.

The St Osyth Priory Estate Business Plan indicates that the project will result in c£31M-74M of additional spending in the local area over a ten year period, with the local economy gaining an average £49M in associated benefits.

1.4 Main Risks

1.4.1 Failure to Achieve Funding

The main risk associated with this business plan is the failure to secure grant funding for the works to be carried out, meaning that the restoration of the buildings involved in the project cannot be achieved and they will remain on the Heritage At Risk Register, and the Trust will not be able to extend their charitable purpose through their usage. We are mitigating this risk through:

1. Recruitment of a Grants and Administration Officer to pursue all other funding opportunities; both to achieve match; OR in the event that the 2024 NLHF bid fails, to consider ways in which the project can be delivered as smaller, discrete and separately funded projects;
2. Addressing issues related to the failure of earlier bids as part of our 'Lessons Learned' and organisational growth;
3. Ensuring that bid documentation is in place and that we have been supported in its preparation by professional teams, who will also be available to swiftly support us in responding to any clarification questions;
4. Ensuring that in exploring all opportunities assuming a successful Round 1 application, that we consider all routes to Round 2, including project underwriting and grant/ loan mixes as detailed in our fundraising strategy.

1.4.2 Historic Perception of Governance and Potential Conflict of Interest

The main reason for the Trust failing to achieve funding in 2023 related to concerns around the nature of the relationship between the Trust, Sergeant Family (the Estate Freeholder), City & Country (Property Developer owned by the Sergeant Family undertaking other work on the site) and Black Jacket (commercial operator). We have mitigated this by taking the following actions:

1. Undertaken a Governance Review
2. Reviewed and updated our Conflict of Interest Management
3. Reviewed and updated our Procurement Management
4. Reviewed and updated our Lease and Partnership Management
5. Ensured Independent Governance - including a Skills Review and Policies and Procedures Review
6. Ensured Good Record Keeping
7. Established a clear and independent methodology for lease agreements in the development stage

We are also confident that the creation of this business plan as a document to guide the Trust's work throughout the project will ensure that the Trust's commercial and charitable interests are maintained and considered separately - but alongside - the work already underway as part of the Site Wide Business Plan.

These areas will be explored in more detail in the relevant sections of this document, as well as through the Appended Files.

2. ABOUT YOUR ORGANISATION

“The Preservation for the benefit of the public of the buildings, monuments and land of particular historical, architectural or construction interest firstly at St Osyth Priory and secondly St Osyth Parish.”

St Osyth Priory & Parish Trust was established in 2016 with the goal of backing the restoration of significant historic buildings at St Osyth Priory, including the Abbot's Tower, Tithe Barn, Old Dairy, Cart Lodge, and boundary walls. These refurbishments were intended to contribute to the establishment of a thriving Wedding Venue and Visitor Attraction.

2.1 Mission and Vision

“Protecting a historic site to deliver educational, visitor, heritage, economic, and community benefit.”

“The vision for this mesmerising collection of buildings and landscape, is to fully revitalise and restore the historic assets to their former glory. By utilising many different options, the estate will have a new long term and viable future that engages with the community and brings new economic prosperity to the local area. St Osyth will become a place that people want to be married, visit, holiday and enjoy.”

2.2 Key Successes

Through various funding sources, we intend to bring these elements back into beneficial use over time. Limited funds and resources require us to adopt a strategic approach to achieve this goal.

A significant success for our Trust was, together with the Sargeant Family, securing funding from the Section 106 enabling development consented on the West Field and within the Park. This amount is designated as match funding for grant bids and is secured via a legal agreement. The money will be paid to the Trust in instalments as the development progresses. Our key success lies in securing this substantial amount to support the restoration of the historic buildings before the funding expiration date. We have in the past secured and managed several key grants:

Cultural Recovery Fund (CRF) - £75,400: this funding enabled the setup of the Education Centre, at the suggestion of NLHF during a site visit.
Two grants from the Wind Farm Trust for £20,000

2.3 Current Activities & Community Benefit

2.3.1 Education Centre

We received feedback from Robyn Llewellyn, Former NLHF Area Director, following our unsuccessful 2018 application that the Trust should seek to develop their track record in project delivery. Following this, we hosted Dawn Bainbridge and Rachel MacFarlane on site in 2019, who provided us with some very welcome advice on how we could develop our

educational and heritage offering on the St Osyth Priory site. In direct response to this, the Education Centre was established in 2021 with the support of Culture Recovery Fund (CRF) funding.

One of our charitable articles is that our work should be “for the benefit of the public”. St. Osyth recognises the importance of childhood visits as an essential part of overcoming barriers to accessing heritage; something that is a key issue in Tendring.

2.3.2 Schools Programme

The Education Centre provides opportunities for children as young as 18 months old. Children can enjoy a wide variety of crafts, games, toys, and books. There is also a preschool Outdoor Explorers programme where parents and their children can explore an area of the Estate learning about its past and the natural environment. 104 children and their parents participated in this programme during 2023. Furthermore, there is a dedicated Forest School space in the Wilderness Garden with activities helping children develop their motor skills as well as imaginative and interactive play.

The Education Centre opened in 2021 created access to St. Osyth Priory which presented opportunities for employment, volunteering and economic benefits to the village by increasing tourists and visitors to the area. The 2023 visitor data for The Education Centre was:

1. Number of Children on site: 1712
2. Number of adults (directly) on site: 146 (+ public at Coronation picnic and Christmas Light Switch-on events)
3. Number of adults (indirectly e.g. accompanying children) on site: 600
4. Number of Children off site: 300
5. Number of adults (directly) off site: 40
6. Number of adults (indirectly e.g. accompanying children) off site: 10
7. Total number of visitors on site: 2458 (+ public at Coronation picnic/ Christmas Light Switch-on)
8. Volunteer time total: 868 hours

2.3.3 Public Programming

By building their public programming, through the Education Centre, St. Osyth Priory & Parish Trust has also been able to give all ages within the local community access to the Priory. Examples of the 2023 programming included:

1. Collaboration with the local representative of United in Kind to provide a tour and mediaeval medicine workshop for adults affected by loneliness.

2. Forest School session for the parents and toddlers from 'Toosey Tots', the village mum and baby group.
3. Special adults Halloween tour of the Priory and talk on the witch trials.
4. Hosted children and their parents at a Halloween Weekend event.
5. Offsite engagement with adults at local Historical, Horticultural and Cultural community groups.
6. Hosted work experience students from Philip Morant School Colchester and Clacton Coastal Academy.
7. Major events e.g the Coronation Picnic and Christmas lights switch on.
8. Write regular articles in 'St. Osyth Life', a community run magazine, which is delivered for free to over 2000 households in the parish.

2.4 Targets

We have established specific targets for our activities as outlined in our business plan. We aim to secure £5,006,478 of funding, excluding funding in place through s106 and related Gift Aid, during the time period related to this project business plan. These funds will be allocated for restoration work, training, educational schemes, and maintenance of assets.

2.5 Legal Status

St Osyth Priory & Parish Trust is a registered charity limited by guarantee, with a standard registration dated 04 November 2016. The Charity is recognised by HMRC for gift aid.

The Ltd Company number is 09367206 and the Registered Charity number is 1170037.

2.6 Key Stakeholders

St Osyth Priory & Parish Trust has associations with the following entities:

1. The Sargeant Family - The Family who own the freehold of the entire estate and will be granting a 90-year lease to the Trust for specific properties that the Trust is able to secure funding to restore in full.
2. Tendring District Council - the local Planning Authority
3. St Osyth Parish Council - the local Parish Council and has a representative on the Trust.
4. Historic England - the Government's heritage adviser and are therefore a statutory consultee to Tendring District Council, with regard to any planning or listed building application.
5. City & Country - the Family's development and construction company, which specialises in the restoration and conversion of historic and listed buildings in England and Scotland. The company is a leading specialist in this particular field with

over 35 years' experience in the heritage sector. City & Country will undertake all the construction and development work for the Family. The Trust will NOT use City & Country for any of the capital or other work related to this project.

6. The Priory Estate - the collective name for the combined heritage assets and land that are viewed as the estate.
7. St Osyth Priory Estate Ltd - the collective name for the combined heritage assets and land that are viewed as the estate.
8. Black Jacket Events - the existing commercial operator working on the site. See 2.6.1 below.

We aim to support the restoration of key historic buildings at St Osyth Priory, and these organisations play a crucial role in achieving that goal in alignment with the St Osyth Priory Business Plan.

These entities either have representatives on the Trust, are involved in funding agreements, or have specific roles in the restoration and development plans of St Osyth Priory.

2.6.1 Black Jacket Events

SOPPT has already identified a commercial operating partner, Black Jacket Events, as the result of the process outlined in a 2016 Colliers Options Appraisal - also in 2016, Savills undertook an independent Feasibility Study for the commercial opportunities on the wider St. Osyth site, and highlighted a number of key points about the weddings market:

"The total population size within a 45-minute drive time is not large enough to attract an external weddings operator."

This was also highlighted in the September 2016 Colliers report which noted that the feasibility of the commercial return depended on the quality and knowledge of the operator.

"It depends considerably on finding an operator or manager with the attributes to deliver it to a high standard."

Having considered this market assessment and how a weddings and events business should be managed, it was concluded that it should be managed via a contract with onsite wedding operator Black Jacket Events at the newly refurbished Darcy House across the lawns from the Tithe Barn.

Now that Black Jacket Events, run by Will and Kayleigh Grinstead based out of Colchester, were already operating venues on other parts of the St Osyth site, it was considered disadvantageous by the Board of Trustees for a second, competing events company - inhouse or otherwise - to try to run the Tithe Barn and Old Dairy events spaces separately.

When consider the options for the Tithe Barn and Old Dairy, The Trust felt that it was unlikely that an external operator will want to take on a venue in this location and furthermore, it will

be important to retain control, so that the other complementary events and accommodation businesses can be operated at St Osyth simultaneously.

By doing so it will be easier to develop a number of enterprises without conflict and with the flexibility to increase or decrease levels of business in specific areas in response to changes in market conditions or performance.

2.7 Current Paid Staff Roles

We currently employ an Education Manager and are in the process of recruiting a Grant and Administration Officer post which will be responsible for grant applications and administration. These are pivotal roles, aiming to facilitate the reach, growth and financial resilience of the organisation. The key responsibilities and aspects of these roles are as follows:

2.7.1 Education Manager

Part Time; 20 hours per week, 0.5 FTE. Key Tasks:

1. Leading a small team of staff, and larger team volunteers, to plan, produce and deliver high-quality education activities which meet the needs of a wide range of schools and education groups.
2. Delivering education programming strands identified within NLHF funding grant (1 day per week).
3. Working closely with NLHF Project Coordinator to ensure planned activity aligns with funder requirements and KPIs agreed with SOPPT and NLHF.
4. Ensuring that reporting and evaluation of activity is delivered in collaboration with Project Coordinator.
5. Coordinating and facilitating photography opportunities for funders.
6. Recruiting and training volunteers to support public education programming such as preschool programmes.
7. Taking responsibility for safeguarding and ensuring all staff and volunteers are DBS checked. Liaising with Safeguarding lead trustee. Organising staff safeguarding training.
8. Advocating for the learning needs of primary and secondary pupils, special educational needs school groups, and community educational groups.
9. Marketing schools programme.
10. Visiting schools to network with teachers and consult on programming opportunities to promote engagement e.g. after school history clubs etc.
11. Working collaboratively with colleagues at St Osyth Museum, SOPPT trustees and NLHF bid stakeholders where appropriate.
12. Developing and marketing weekend and evening educational workshops aimed at organised groups (adults and children) to generate revenue. Identifying artisans/ experts to lead these and negotiating day rates supported by Operations and Activities steering group.
13. Managing administrator to monitor ticket sales and marketing activity.
14. Writing press releases and promoting the work of the Education Centre through social media.
15. Keeping up to date with policies, strategies and initiatives in the heritage education sector and networking to maintain and develop links with similar organisations e.g. Historic Houses Association. Keeping up to date with safeguarding and health and safety policy.

16. Managing budgets, including commissioning external contractors, annual planning in collaboration with SOPPT Treasurer.
17. Supporting SOPPT by inputting into larger Trust-wide funding bids, business cases, planning documents and reports.
18. Writing grant applications specific to the work of the Education Centre in collaboration with trustees.
19. Continuously demonstrate inclusive behaviours, valuing everyone's contribution, and promoting a culture of openness.
20. Managing health and safety policies, procedures and risk assessments to safeguard your own personal safety and that of others. Supporting Chair of Operations and Activities trustee steering group and liaising with health and safety consultants where necessary.
21. Communicating safety concerns and updates to Chair of Operations and Activities steering group and commercial team if/ when any change to environment is noticed by the Education team.

2.7.2 Grant and Administration Officer

1. Full Time; 40 hours per week, 1.0 FTE. Key Tasks:
2. Development of a fully integrated Fundraising Strategy for St Osyth Priory - including ongoing funding of the Past Preserved project.
3. Developing a fundraising strategy and making applications to raise funding for The Abbot's Tower as part of a future wave of works.
4. Proactive building of funding pipeline and opportunities.
5. Creating, writing, submitting and managing the creation of funding applications.
6. Responsible for Funder reporting, evaluation and funding management.
7. Providing updated financial information to assess and monitor impact and cash flow projections.
8. Working with the Trust to ensure that fundraising strategy meets priorities and supports the business plan.
9. Develop a strategy to maximise giving opportunities across all activities and events, including community giving and Gift Aid.
10. Ensure that all funder deadlines and grant condition requirements are met.
11. Responsible for planning and creation of all mass electronic communication sent to stakeholder groups and Trustees regarding funder updates.
12. Assist in establishing set donor management processes
13. Assist in developing donor journeys

14. Support the development of a new CRM database
15. Help us develop exciting new creative community fundraising strategies through developing resources, engaging volunteers and building relationships with local groups and organisations.
16. Support the development of a Major Donor strategy.
17. Support the development of events fundraising.
18. Explore new and alternative sources of funding.
19. Any other duties as may be reasonably requested.
20. Work as part of the management team of St Osyth Priory & Parish Trust contributing to business planning and budgetary processes to ensure successful Trust sign off.
21. Oversee the day-to-day running of the Trust.
22. Keep appropriate records and meeting minutes and liaise with Trustees to ensure actions from Board meetings are followed up and implemented.
23. Manage website and Social Media administration .
24. Administer payments and invoices and liaise with the Treasurer for payments.
25. Support the Education Manager in organising any Trust events.
26. Diarise and coordinate regular Trustee and Working Group meetings, keeping minutes and actions arising.
27. Support the Secretary on the annual audited accounts.
28. Communicate and correspond with community organisations, and support the Education Manager in promoting the schools and outreach programme

2.7.3 Note on Future Organisational Growth

We recognise that the scale of proposed development will necessitate the creation of additional management and operational roles which are set out in Section 3. “Governance and Management Structures”. These will be subject to review as our business and change management plan is developed during the Development Stage. Note that we are unable to begin to recruit into these roles until the project begins and funding is awarded as we need to ring fence funding for its intended purposes.

2.8 Volunteers

There are currently 74 active volunteers who support the work of the Education Centre and the wider efforts of the Trust. They are managed according to our Volunteer Handbook, and supported by Helen Brown, Education Manager, and Sonia Grantham, Trustee in Charge.

In 2023, 868 hours were donated to the work of the Trust by Volunteers, something which we have targeted for growth moving forward to support both the core work of the Education Centre and pilot activities as we begin the Past Preserved Project.

Volunteer roles include:

1. Marshalling events to give directions and prevent public entering areas that are off limits.
2. Supervising students and public and areas of the estate. Staff remain responsible for behaviour and overall safety.
3. Leading set activities following appropriate training.
4. Accompany tours on the tractor trailer.
5. Assisting with the set up and packing away of activities.
6. Assisting in the promotion of St. Osyth Priory & Parish Trust and Education Centre and their work.

2.9 Current and Planned Funding

One of our main sources of income for this project currently is the £1.178 M already pledged from the consented enabling development. This funding plays a key role in enabling us to secure additional grant funding as match funding. Moreover, Gift Aid is another source that we intend to utilise, with an allowance of £200,000 that could be claimed against the enabling money.

Approximately £300,000 has been spent in setting up and running the Education Centre along with professional costs in making grant bids over the years. The Trust has bid successfully for grants in the past from the Cultural Recovery Fund (CRF) for an amount of £75,400, as well as being awarded two grants from the Wind Farm Trust for c.£20,000.

Historic England have in the past given a grant to the Estate and are very supportive of the Trustees and the work that the Trust is doing. The expectation is that further grants will be forthcoming from Historic England once the Trust has made a successful bid for NLHF funding. grants to the Estate and are very supportive of the project and there is an expectation further grants will be forthcoming in the future. The Family has also indicated that they will make further donations.

However, there isn't a consistent pattern of raising money year after year. The past success will serve as a solid base from which to expand fundraising activity, and the new capital project and expanded activities will provide opportunities to reach out to and engage new funders. In addition, the successful management of past philanthropic income will help reassure supporters that their investment will be safe, but they will expect to see a strong plan in place for how all income streams will be utilised to create sustainability in the future. The Trust is advertising for a Grants and Administration Officer to deliver against the Strategy, with the support of the Project Coordinator and Project Manager.

The Site Business Plan agreed by the Council recognises that there is a need for further enabling development, which could be a further avenue of funding in the future if the Trust can demonstrate that it has been successful in winning and efficiently deploying grant monies. Our current research has indicated there is potential to secure matched funding

from trusts and foundations - with total opportunities just from these sources alone of £3,188,000.

3. GOVERNANCE AND MANAGEMENT STRUCTURES

3.1 Governance Summary

St Osyth Priory & Parish Trust is committed to fostering a culture of strong leadership and professional management, adhering to the highest standards as set forth by the Charity Governance Code and UK Charity Commission guidance.

The Board of Trustees is made up of nine individuals, selected from a diverse range of professional backgrounds, who provide governance and monitoring of performance and strategy through various subgroups. The responsibility for the day-to-day operations of the Trust is delegated to the Chair of Trustees.

Our governance structure includes a board of trustees or representatives from various organisations including City & Country, Tendring District Council, and St Osyth Parish Council who are involved in the development of tourism, events, and leisure enterprises at St Osyth Priory Estate. Historic England is also involved as a statutory consultee for planning and listed building applications.

The board plays a crucial role in decision-making related to business planning, pricing policies, marketing strategies, financial management, fundraising, approving projects, and maintaining oversight. We may also commission advisers and consultants for specific expertise required for restoration and development projects.

3.2 Statement on Governance

In the last year we have undertaken a comprehensive governance review to assess our current practices and identify areas for improvement. The review involved input from all our trustees, staff, and volunteers, as well as third-party training and consultancy. We are committed to embedding the principles of good governance into all aspects of our work.

There are now nine trustees on the Board since our last application in 2022, thereby increasing the Trust's resilience and independence exponentially. In response to feedback from our previous submission, the Trust has undertaken an extensive Governance Review, developed a best-practice strategy for continuing to develop our independence and resilience and ensuring we have an actionable implementation plan to continue that growth.

As a Board, we are committed to maintaining high standards of governance and have taken several positive steps to strengthen our governance practices. Further details of the steps we have taken are available in our Governance Strategy and Action Plan, appended to this document.

Key Findings from our Governance review were:

1. We have a strong commitment to our charitable purpose and a clear understanding of our role in the community.
2. We now have more robust procedures for managing conflicts of interest.

3. Our trustees are passionate about our charity and have a wide range of skills and experience.
4. We have effective systems for financial management and risk management.
5. We need to strengthen our communication and engagement with our stakeholders.
6. We need an ongoing phased action plan - outlined below - which supports appropriate policy development and then training in how to implement those policies using best practice.

3.3 Board Composition

The Board of Trustees consists of:

Name	Role/ Position
Conrad Payne	Chair of Board and Senior Director at Strutt & Parker, Property Consultants <i>Chair of the Board of Trustees NLHF/ Project & Working Capital Sub Group</i>
Michelle Behr	Architectural History PhD Candidate and Project Sub-Group Lead. Former Director of New Deals, Design, and Construction at Belmond <i>Finances and Fundraising Sub Group Chair, HR & Recruitment Sub Group Chair, NLHF/ Project & Working Capital Sub Group</i>
Andy Booth	Managing Director of Naglotech, IT Support <i>Operations and Activities Sub Group</i>
Dr. Hasan Chowhan	Senior Partner, Creffield Medical Centre, Colchester. Chair of the North East Essex CCG <i>Governance & Legal Sub Group</i>
Sonia Grantham, BEM	Retired Educator <i>Chair, Operations and Activities Sub Group Governance & Legal Sub Group HR & Recruitment Sub Group</i>
Pam Green	NHS Alliance Director, Basildon and Brentwood

	<i>Chair, Governance & Legal Sub Group</i>
David Harrington	Investment Banker (Retired) <i>Chair, Finances and Fundraising Sub Group</i>
Howard Parkinson	Solicitor (Retired) <i>Governance & Legal Sub Group NLHF/ Project & Working Capital Sub Group</i>
Tim Sargeant	Chairman of City & Country <i>Finances and Fundraising Sub Group</i>

3.3.1 The Board of Trustees Function

The Role of the Chair

1. The Board meetings are managed by the Chair of Trustees, whose role is to chair meetings of the Trustee Boards and keep discussions to the agenda and ensure that meetings are productive and decisive.
2. They are in place to act as a channel of communication between the Sargeant family, Board and staff on the St Osyth Priory Estate and Buildings.
3. They are also authorised to represent the Trust for example, representing at functions, meetings or in the press.
4. They will lead on the development of the Board and ensure its decisions are
5. Implemented.
6. In certain circumstances and with prior agreement, they are also authorised to take urgent action between board meetings when it isn't possible or practical to hold a Meeting.
7. The Chair will be elected annually at the January Board meeting by Trustee nomination, vote and majority consensus.

Frequency of Full Board Meetings

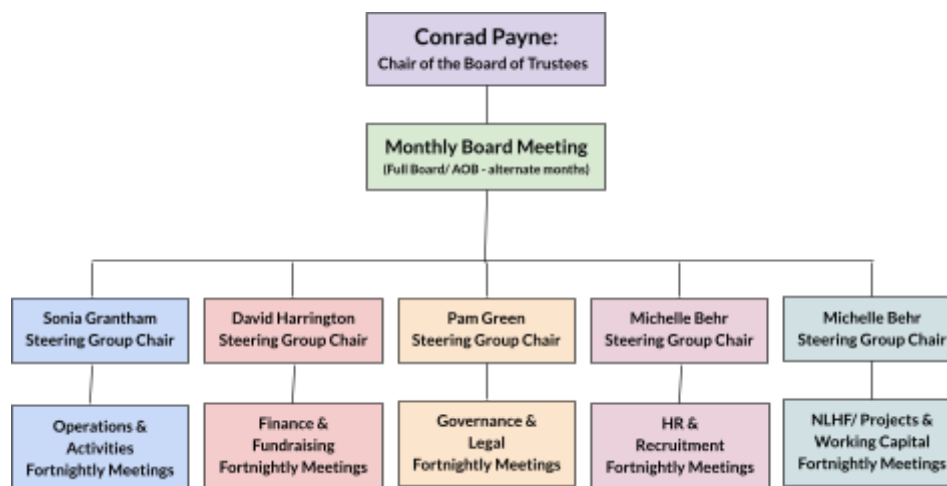
1. A full board meeting at which policies, decisions, budgets and financial matters will be
2. signed off, will be held every two months.
3. Meetings in the alternate months will be scheduled for AOB to keep fundraising and site
4. management issues on track.

ALL expenditure above £1000 MUST be signed off by the Board.

Our governance and financial policies and procedures, including grant management, are reviewed annually. Our policies around delegated authorities and conflicts of interest and/ or authority are enshrined in our Articles of Association.

If a conflict of interest arises, it must be declared and the conflicted trustee must be absent from the part of the meeting where there is any discussion of any arrangement or transaction affecting that party; the conflicted Trustee does not vote on any related matter. Unconflicted Trustees must authorise that it is in the interests of the charity to authorise the conflict of interest.

3.3.2 Figure 1: Governance Structure



3.4 Steering Groups

We have established a steering group within the St Osyth Priory & Parish Trust to enhance our governance alongside the Board of Trustees. Our primary objective is to conserve and rejuvenate the historic buildings at St Osyth Priory while actively involving the community and fostering economic growth.

By mutual agreement in January 2022, in order to facilitate agile working and optimum efficiency, the Trust is managed by the following five Steering Groups, composed of Trust members, and a chair responsible for reporting back to the full board.:

1. Operations and Activities
2. Finances and Fundraising
3. Governance and Legal
4. Human Resources and Recruitment

5. National Lottery Heritage Fund (NLHF) Bid Application (Project and Capital Working Group once grant funding is received)

We convene these steering groups fortnightly to address their respective areas of focus, with agendas and minutes circulated beforehand to ensure transparency and accountability. The chairs of each steering group update the full board, which meets bi-monthly to make significant decisions, approve budgets, and review key actions. Overall, these steering groups are instrumental in supporting the trustees and ensuring the efficient management and sustainability of St Osyth Priory and its related activities.

3.4.1 Operations and Activities

Purpose of the Steering Group

1. Take a pragmatic approach to site management in respect of St Osyth Priory & Parish Trust activities, including those of the Education Centre.
2. Review day-to-day Trust and Education Centre operational issues and schedules of events and ensure Health and Safety procedures are adhered to, in conjunction with any site and capital works project managers.
3. Oversee and approve the production and development activities and operations that ensure a commercially viable future for the properties that are in the agreed remit of St Osyth Priory & Parish Trust, in line with our agreed common vision and aims.
4. Offer insight, support and productive challenge to ensure the successful development and implementation of a business plan for the properties that are managed by the St Osyth Priory Estate and associated buildings and commercial developments.
5. Monitor and approve changes in activity plans, educational activities, operational recommendations – including but not limited to submission of proposals, applications and project plans for submission and recommendation to the Full Board.
6. Sense check and assist with the public consultation programme to ensure appropriate local and widespread community participation in the creation of the Strategy.

MEMBERSHIP

The following Trustees are members of the Steering Group:

- Sonia Grantham
- Andy Booth

The Steering Group will be chaired by Sonia Grantham, who will represent the group and lead on updating the Board on the activities of the Steering Group at the meetings of the Full Board.

3.4.2 Finances and Fundraising

Purpose of the Steering Group

1. This Steering Group will monitor the effectiveness of the implementation of the business plan and review the financial situation and cash flow and make recommendations for updates and changes in approach and activities.
2. They will have authority to work with Tricolor, external consultants in developing and building the fundraising strategy and making recommendations to the Board.
3. They will support the implementation of the fundraising strategy by reviewing funder recommendations and meeting with funders where appropriate.
4. They will be able to sign off financial decisions that total below £1,000 in value.

MEMBERSHIP

The following Trustees are members of this Steering Group:

- David Harrington
- Michelle Behr
- Tim Sargeant

The Steering Group will be chaired by David Harrington, who will represent the group and lead on updating the Board on the activities of the Steering Group at the meetings of the Full Board.

3.4.3 Governance & Legal

Purpose of the Steering Group

1. This Steering Group will lead on carrying out and reviewing the skills development and audits of the Board.
2. They will lead on recruiting new Board members and ensuring the development and training needs of existing Board members.
3. They will review HR requirements and ensure that legal requirements and obligations are met.
4. They will review and ensure that all meetings, activities and events are carried out in line with the legal requirements of the Charities Commission and other relevant bodies.
5. They will ensure that all legally required and industry best practice reporting and monitoring requirements are met.
6. They will review the latest legislation guidelines and tools to keep the operation of the Board and Trust up to date, efficient and legally compliant.

MEMBERSHIP

The following Trustees are members of the Steering Group:

- Hasan Chowhan
- Pam Green
- Howard Parkinson
- Sonia Grantham

The Steering Group will be chaired by Pam Green, who will represent the group and lead on updating the Board on the activities of the Steering Group at the meetings of the Full Board.

3.4.4 HR & Recruitment

Purpose of the Steering Group

1. The group ensures that HR and recruitment strategies align with the overall strategic objectives and the vision set by the board. This involves assessing current and future talent needs, identifying skills gaps, and developing plans to address them.
2. The group is responsible for developing HR policies and procedures that comply with legal requirements and industry standards. This includes policies related to recruitment, hiring, diversity and inclusion, performance management, employee relations, and other areas relevant to workforce management.
3. The group oversees the recruitment process to attract and retain talent. This involves developing recruitment strategies, establishing sourcing channels, defining selection criteria, and monitoring recruitment metrics to ensure efficiency and effectiveness in talent acquisition.
4. The group monitors key HR and recruitment metrics to assess the effectiveness of initiatives and strategies. This may include metrics such as time-to-fill, cost-per-hire, turnover rates, employee engagement scores, and diversity metrics. Regular reporting to the board enables informed decision-making and adjustments to HR strategies as needed.
5. The group identifies HR-related risks and develops strategies to mitigate them. This includes succession planning to ensure continuity in leadership positions, identifying high-potential employees for development, and creating plans to address potential talent shortages or disruptions.

MEMBERSHIP

The following Trustees are members of the Steering Group:

- Michelle Behr
- Sonia Grantham

The Steering Group will be chaired by Michelle Behr, who will represent the group and lead on updating the Board on the activities of the Steering Group at the meetings of the Full Board.

3.4.5 National Lottery Heritage Fund (NLHF) Bid Application

Purpose of the Steering Group

1. The group ensures that bid preparation is on track and provides the consultant team with the required information and documents
2. The group sends key expenditure items involved in bid preparation to the Board for approval, for example, valuation studies.
3. The group coordinates Board sign off of key documents and ensures that any changes to the bid are communicated
4. The group leads on sign off of materials and has responsibility for submission
5. The group liaises with the NLHF to ensure feedback is given and that any clarification requests are quickly responded to

MEMBERSHIP

The following Trustees are members of the Steering Group:

- Michelle Behr
- Howard Parkinson
- Conrad Payne

The Steering Group will be chaired by Michelle Behr, who will represent the group and lead on updating the Board on the activities of the Steering Group at the meetings of the Full Board.

Please note that this Working Group will become the **Projects and Working Capital Group** as and when as hoped, the NLHF grant has been awarded.

3.5 Management Structure

At present, our staffing structure at St. Osyth comprises a dedicated Head of Education Centre, who is currently in post, alongside an open position for a Grants and Administration Officer. However, with the anticipation of a successful funding bid, we aim to expand our team significantly.

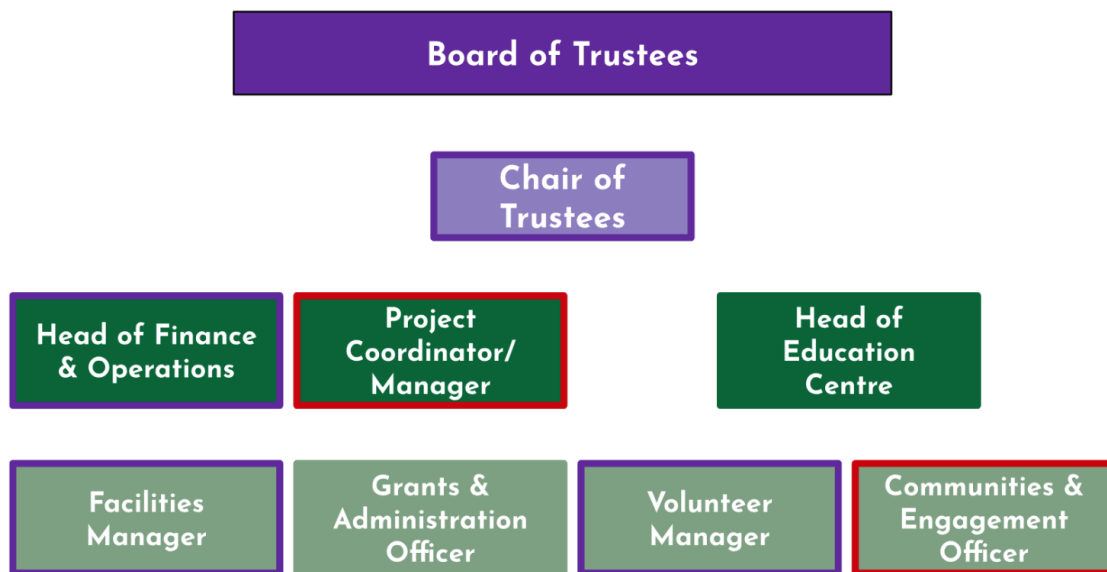
This includes the introduction of vital roles such as a Project Coordinator and a Communities and Engagement Officer, who will play integral parts in driving our initiatives forward.

Looking ahead, our vision for further development hinges on the success of income generation activities, which will pave the way for the establishment of key positions such as a Head of Finance and Operations, a Head of Audiences, Marketing and Communications, a Facilities Manager, and a Volunteer Manager.

These additions will not only bolster our operational capacity but also ensure that we continue to serve our community effectively and sustainably into the future.

3.5.1 Figure 2: Aspirational Organisational Structure

One potential organisational structure is illustrated below:



Roles indicated in 'Red' show NLHF Project funded roles; roles indicated in purple indicate potentially aspirational roles and those in green show those already in place/ currently being recruited.

These will be subject to review as our business and change management plan is developed during the Development Stage, with a particular focus on impact on profit levels versus return and our ability to take on subsequent projects.

3.3 Recruitment Policy

All staff posts will be advertised externally with the following exceptions:

1. If we have a suitably qualified member of staff on our payroll that we move into the post created by the funded Tithe Barn Project;
2. If we have a suitably qualified member of staff on our payroll whose hours we are extending so that they can work on the Project.

We will provide evidence of the recruitment procedure we followed as part of our recording requirements. All salaries will be based on sector guidelines or similar posts elsewhere. We will use the Living Wage rate for all Project staff at a minimum, and we will ensure that we undertake sector benchmarking for similar posts through Arts Jobs, Glass Door and other recruitment portals as appropriate.

Recruitment of professional consultant teams and contractors is subject to our Procurement Policy, appended to this business plan.

3.4 Volunteers

“I recently moved back to the village of St. Osyth in retirement, which was the place where I was brought up and enjoyed my childhood there. The Priory has always been a big part of my life as when I was a young child I had been allowed to go to the Priory many times and have happy memories from that time.

I knew as soon as I came back to the village that I wanted to get involved at this very exciting time for the Priory where I am witnessing its transformation and coming back to life with the restoration project that is currently being undertaken by the Sargent Family and the Priory Trust.

The Priory has played such an important part of British History for over a 1000 years and for me as a ‘local’ I feel this is so important to continue to make this a living and working space once again.”

Sheila Phillipson, SOPPT Volunteer

Volunteers provide a supporting role to the staff and Trustees of St. Osyth Priory & Parish Trust and Education Centre. Volunteers are given training in order to complete this role and are consulted at all stages about what is expected of them while volunteering.

This could include but is not limited to:

1. Marshalling events to give directions and prevent public entering areas that are off limits.
2. Supervising students and public and areas of the estate. Staff remain responsible for behaviour and overall safety.
3. Leading set activities following appropriate training.
4. Accompany tours on the tractor trailer.
5. Assisting with the set up and packing away of activities.
6. Assisting in the promotion of St. Osyth Priory & Parish Trust and Education Centre and their work.

The current team of 74 volunteers dedicated 868 hours in 2023 to supporting the delivery of work from our Education Centre. They are managed according to our Volunteer Handbook,

and supported by Helen Brown, Education Manager, and Sonia Grantham, Trustee in Charge.

The current volunteer force represents a relatively even split between male and females, with a variety of age groups comprising the demographic makeup of the team, encouragingly including 9 individuals aged under 18, providing a picture of volunteer tasks that do not face barriers due to age. The volunteer log reveals a variety of tasks undertaken in 2023 as outlined above.

4. STRATEGY

4.1 Trust Aims

The aims of The St Osyth Priory & Parish Trust, Board and all associated Steering Groups are to deliver the following key ambitions:

1. To help secure a future for the incredibly important historic buildings at St Osyth Priory.
2. The vision for this mesmerising collection of buildings and landscape, is to fully revitalise and restore the historic assets to their former glory. By utilising many different options, the estate will have a new long term and viable future that engages with the community and brings new economic prosperity to the local area.
 - a. St Osyth will become a place where people want to be married, visit, holiday and enjoy.
3. St Osyth Priory Education Centre's mission is to provide memorable educational experiences which support well-being and mental health.
 - a. It achieves this by inviting learners of all ages and backgrounds to explore its naturally beautiful and historically important site. Its programme enhances the national curriculum by ensuring learners spend time outside in a captivating natural setting which inspires their wonder and curiosity.

4.2 Key Activities

In line with the Trust's mission and aims, key activities outlined in the business plan include focusing and expanding the Trust's current education offering to take advantage of the new spaces, generating revenue through commercial hire of the Tithe Barn.

The income from this will enable the Trust to be self-sustaining, and to take on restoration of the Abbots Tower in the next phase of work, which will also complement the existing educational and visitor offer once developed.

This will help to support the wider business plan's aims of developing and implementing tourism, events, and leisure enterprises on the St Osyth Priory Estate. These enterprises will contribute to the restoration, conservation, and ongoing maintenance of the heritage assets, many of which are in a state of disrepair - the overall objective being to remove the Priory and its precincts from Historic England's Heritage at Risk Register in its entirety.

The coordination of these projects will work together to achieve the Trust's goals of restoring and preserving the heritage assets at St Osyth Priory while making the estate commercially viable. The impacts of these projects on the organisation may include increased operational complexity, resource allocation challenges, and the need for effective project management.

To address these impacts, the Trust plans to collaborate closely with stakeholders, allocate resources efficiently, and implement robust project management practices to ensure the successful execution of the initiatives outlined in the business plan.

4.3 Connection to Local Strategies

The project has been developed to align with a number of local strategies, and specifically priorities within the Tendring Economic Strategy 2019-2024 and Tendring District Council Corporate Plan 2020-2024, including:

1. Diversification of the local business base: there are few historic houses and/or exclusive-use wedding venues in the local area.
2. Creation of more employment opportunities - both during and beyond the project.
3. Valuing Tendring as a place where people want to live and work, leading to pride in place.
4. Promoting partnership at a local and regional level: building relationships between community groups and the Trust.
5. Development of skills and aspirations in residents: inspired by the monastic history to build confidence and wellbeing. Partnerships are being developed with community organisations including Clacton Guides, Extra Support for Families, and the Ambitious Women in Essex Network.
6. Promotion of Tendring's tourism, cultural and heritage offers: as outlined in the Tendring Heritage Strategy, much of the area's heritage tourist attractions are focused in Harwich and Walton-on-the-Naze.
7. This project will build on the work of Heritage Lottery Funded project 'Resorting to the Coast', that celebrates and shares the seaside heritage of Tendring, particularly Clacton-on-Sea and Jaywick Sands, along with the Jaywick Martello Tower, to create an attractive hub of heritage assets in the local area.

4.4 Timetable for Review & Restrictions

The timetable of works under the original Section 106 agreement proposed involves restoring the buildings in the historic precinct by September 2026, which is 10 years from the Committee Resolution of September 2016.

The progress of the project and drawdown of available funding must be reviewed in advance of this date.

The programme of works proposed in the February 2024 NLHF application proposes works completing in February 2028, 4 years from the date of this outline business plan. The expectation is that the strategy will be reviewed in advance of this date as part of the development of the business plan during the development phase, but this strategy and

outline business plan must be reviewed in advance of the expected completion date of the delivery phase.

5. MARKET APPRAISAL

5.1 Local Social Context

Our target market for St Osyth Priory & Parish Trust would likely encompass a diverse range of individuals, particularly those residing in the Tendring District of North East Essex, which is characterised by high levels of deprivation.

The most likely people to access our services would be those living in the area, including families, older adults, and individuals of all ages seeking opportunities for community engagement, education, and leisure activities - it could include tourists interested in heritage sites, history enthusiasts, investors in heritage restoration projects, and potentially film, TV, and photographic production companies looking for filming locations.

Given the area's demographics, our service would cater to both single and repeat customers, as the community would likely benefit from ongoing support and engagement. Our target market would consist of individuals with varying needs, behaviours, tastes, and preferences, including those interested in community events, cultural activities, educational workshops, and wellness programs.

Additionally, given the area's high rates of social isolation, mental health issues, and limited access to services, our target market would include individuals seeking support and resources to improve their overall well-being.

In summary, our target market should encompass residents of the Tendring District and surrounding areas, particularly those affected by the region's socio-economic challenges. This includes families, older adults, and individuals of all ages seeking community engagement, cultural enrichment, educational opportunities, and wellness support.

By offering a multifunctional community space, hireable venue, partnership programs addressing local issues, and access to heritage, St Osyth Priory aims to provide inclusive opportunities for economic growth, community development, and well-being improvement within the deprived area. Our target market strategy should prioritise inclusivity, accessibility, and addressing the diverse needs of the local population, with a focus on providing support, resources, and opportunities for personal and community growth.

Within 0-5 minutes:

Population Size: Approximately 3,200 people reside within this area.

Housing: Over 80% of the homes are either detached or semi-detached houses.

Household Composition: Around 70% of households do not have dependent children.

Economic Activity: Approximately 60% of the population is economically active, with a higher proportion being self-employed compared to the national average.

Socio-Economic Status: The AB socio-economic category is underrepresented, while the C2 category is overrepresented compared to the national average.

Leading mosaic type: D14 Satellite Settlers: 24% (820 households) - Mature households living in expanding developments around larger villages with good transport links.

Within 5-15 minutes:

Population Size: Approximately 65,000 people live within a 5-15 minute drive of St Osyth Priory.

Housing: 70% of residences are detached or semi-detached houses, with detached houses notably more common than the national average.

Household Composition: There is a higher proportion of family groups with at least one dependent child compared to the immediate locality of the priory. Three-quarters of households have at least one car, similar to the national average.

Economic Activity: A much larger proportion of the population is economically inactive compared to the national average.

Socio-Economic Status: The area is not affluent and is dominated by elderly residents.

Leading Mosaic Type: The leading mosaic type is E19 Bungalow Haven, which represents 17% of the population. These are peace-seeking seniors appreciating the calm of bungalow estates designed for the elderly.

Within 15-30 minutes:

Population Size: Approximately 209,000 people live in the next 15-minute band, which includes Colchester.

Housing: About 63% of the housing stock is detached or semi-detached houses, with the proportion of detached houses much higher than the national average.

Household Composition: Approximately 46% of households have at least one dependent child, most commonly living with two parents.

Economic Activity: The nature of employment is not far off the national average in most respects.

Socio-Economic Status: This area is more oriented towards higher-income groups compared to the immediate vicinity of the priory.

Age Breakdown: The population has a relatively even age distribution, with significant proportions across all age groups, including children, young adults, middle-aged adults, and seniors.

Leading Mosaic Type: The leading mosaic type is E19 Bungalow Haven, representing 8% of the population. These are peace-seeking seniors appreciating the calm of bungalow estates designed for the elderly.

Within 30-60 minutes:

Population Size: Approximately 750,000 people live in the area 30-60 minutes from the priory, including large towns like Ipswich and Chelmsford.

Housing: While a lower proportion of housing is detached and semi-detached compared to the area closer to the priory, it still represents about two-thirds of all residential property.

Household Composition: About 45% of families in this area have at least one dependent child, reflecting a strong bias towards family age groups (children and midlife adults). There is a lower representation of individuals aged 18-34.

Economic Activity: The level of economic activity in this area is significantly above the national average.

Socio-Economic Status: There is higher representation than the national average in the ABC1 socio-economic groups, indicating a more affluent population compared to areas closer to the priory.

5.2 Demand for Commercial Provision

We consider the properties on the St Osyth Priory Estate desirable in the market due to their location, which should protect them from minor market fluctuations. Additionally, the site wide business plan includes sections on Weddings, Corporate Events, and Accommodation, indicating our focus on these areas for revenue generation.

We also mention the availability of commercial funding from banks in the main site wide business plan. While banks are becoming more cautious, the scale of the project and investment from other sources should minimise risk to banks. This suggests a cautious but potentially stable market environment for our project.

In our analysis of competitors within the sector, we've extracted insightful findings from a comprehensive comparator report, illuminating their strategies and offerings. Here's a distilled summary of our observations:

Charging Models: Competitors in our sector demonstrate a wide range of pricing strategies. Venue hire fees vary significantly, ranging from as low as £750 to as high as £8,000, showcasing diverse options catering to different budgetary preferences. Similarly, wedding packages are offered at varying price points, ranging from £50 to £200 per person. Additionally, supplementary fees for services like alcohol provisions and accommodation are common, reflecting a tailored approach to client needs.

Accommodation: Our competitors boast a diverse array of accommodation options, ranging from on-site lodgings within the main structure to separate guest houses, shepherd's huts, and bell tents. Accommodation capacity spans from cosy retreats for two to larger setups capable of hosting up to 69 guests, potentially serving as an additional revenue stream for venues.

Lessons Learned: Competitors have implemented various strategies to optimise their offerings and minimise negative impacts. These include limiting the number of weddings hosted annually to preserve the integrity of historic premises, offering micro and intimate wedding options at lower price points to cater to evolving consumer preferences, utilising outdoor spaces creatively for ceremonies and receptions, accommodating different catering options, and introducing special pricing for weekday weddings to tap into niche market segments.

Maximising Financial Viability: Competitors are exploring diverse revenue streams beyond weddings, such as corporate events, private functions, and group tours, to optimise venue utilisation. They're also crafting bespoke packages and experiences, developing on-site amenities like shops, cafes, and holiday cottages, and offering add-on services like wedding planning to enhance the overall customer experience and drive revenue growth.

How to Differentiate: Competitors are leveraging their unique strengths to stand out in the market. These include historic buildings with unique architecture and features, expansive gardens, woodlands, and rivers providing picturesque outdoor spaces, specialty attractions like airfields and aircraft collections, and flexibility in accommodating different ceremony types and menus.

5.3 PEST Analysis

National socio-economic trends or policies that could impact the market include fluctuations in the exchange rate against the Euro, which can influence consumer behaviour in choosing holiday destinations. Additionally, the levels of competition in the market are increasing, indicating a competitive landscape that St Osyth needs to navigate.

Changes in the political, economic, social, and technological environments could have various impacts on our operations. For example:

Political: Changes in government policies related to tourism, taxation, or regulations could affect our business environment.

Economic: Fluctuations in the economy, such as changes in consumer spending, disposable income, or interest rates, could impact the demand for paid-for-events, and large functions such as weddings

Social: Societal trends, preferences, or demographics could influence consumer behaviour and choices in destinations and days out.

Technological: Advancements in technology could impact how we market our facilities, manage bookings, or interact with communities.

Overall, while we seem well-prepared to navigate potential changes in the market and external environments, we should continue to monitor and adapt to any shifts in political, economic, social, and technological factors that could influence our operations.

5.4 SWOT Analysis

STRENGTHS	WEAKNESSES
Education Centre's role in the bid - boosts appeal to funders	Scale of Project & small staff team
Large reserves via S106 available as match	Age and experience of the Trust
Vocal and supportive partners in the council and family	Support required with procurement via appointed PM
Tendring MPs will be supportive	
OPPORTUNITIES	THREATS
Multi-use of Tithe Barn	All work to be completed within 10 years (S106)
Located in an NLHF Priority Area	Potential hyper-local/ resident perception
Project can address other health and social equality issues	Contract/ need for rental of education space
Specialist staff can be grant funded to support skills deficit	
Opportunity to develop governance	
Meet with and learn from comparators in heritage sector	

5.5 Marketing Strategy

The website is currently being developed, we are looking into linking the Trust's website with the active website's of the Education Centre and St Osyth Priory Estate - we have allowed some budget within the development phase to support this. There is an active St Osyth Priory Education Centre Instagram account. Black Jacket already has an active marketing campaign for the wider site they have use of, and, wherever possible we share marketing resources and co-run promotions with the St Osyth Museum.

We have also included further marketing support within the Business Planning Brief for the development of a marketing strategy that aligns with our business plan as it continues to be developed, to promote our pilot and ongoing community activities.

6. FINANCIAL APPRAISAL

6.1 Summary and Notes

Our financial model includes multiple sources of funding to support our operations and achieve our long-term vision to restore and preserve key historic buildings on the St Osyth Priory Estate and deliver community engagement in those spaces, in a way that is financially supported through income generating activities.

In summary, the St Osyth Priory & Parish Trust has laid out a comprehensive financial plan that relies on a mix of grant funding, income generation, and Gift Aid to support our day-to-day operations and achieve our long-term vision for the Priory. The financial need is significant, but our strategy of securing grants and generating revenue positions us well to fund the necessary restoration work and maintain the heritage assets effectively.

Based on our current assumptions and projections, we will generate a substantial profit of £183,037 by the end of the first operating year alone, including a 50% contribution to the sinking fund. The growth that we then continue to achieve will allow us to scale up and prepare the organisation for growth in preparation to remove other buildings from HAR that are in control of the Trust.

6.1.1 Grant Funding

Subject to successful grant applications, the majority of the funding for Phase 1 of our capital project will come from the National Lottery Heritage Fund and other matchfunders, who we will engage and make applications to during the delivery phase of our project with the support of our Grants and Admin Officer. Our detailed fundraising strategy is included in the Appendices to this business plan, which has the aim of securing the gap in match funding during the development phase of the project, included as a linked Appendix. The aims of our Fundraising strategy are to meet short-term capital and revenue funding needs, as well as to create new funder relationships and income streams for the longer term. This will be achieved by:

1. strengthening relationships with past / existing funders
2. identifying the best new prospects and building new relationships with them
3. implementing a programme of stewardship / donor care, including reporting to trusts and foundations
4. creating new funding mechanisms to secure and retain individual donors – e.g. through mailing list, social media engagement and appeals

These grants will be crucial for funding restoration work, delivery of our community engagement and community programming and maintenance of assets.

6.1.2 Enabling Money

This project is underpinned by the monies secured via the Section 106. We are also able to reclaim £200,000 as Gift Aid against the Enabling Money. This money is intended to be used

as match funding to support delivery of the project and help to secure additional grant funding.

The project is supported by the council as evidenced in our Letter of Support and the s106 funding. With the funding environment having been competitive post Covid, we see potential future funding through further enabling development on the wider St Osyth Priory Estate and we would also approach TDC to ascertain the likelihood of them underwriting any potential funding gap while we work to close this through our fundraising work.

6.1.3 Income Generation

We expect to receive rental income from the Tithe Barn and Old Dairy with additional income from both paid-for community events and programming and learning programmes, as well as from fundraising activities.

6.1.4 Financial Need

The total costs of the Past Preserved Project are calculated at £6.6M, with a conversation deficit of 4.3M, underlining the need for grant funding and the financial need to generate profits through this project to financially support our future work - specifically, including the full development of the Cart Lodge and the restoration of the Abbots Tower.

6.1.5 Day-to-Day Operations

Our financial model includes provisions for ongoing operational costs, such as maintenance of assets, training programs, and potential additional works.

6.2 10 Year Profit and Loss Account

St Osyth Priory & Parish Trust - 10 Yr P&L Forecast		Development Phase June 24 to Feb 26		Delivery Phase June 26 to February 2028		YR 1	YR 2	YR 3	YR 4	YR 5			
		Apr24-Mar25	Apr25-Mar26	Apr26-Mar27	Apr27-Mar28	Apr28-Mar29	Apr29-Mar30	Apr30-Mar31	Apr31-Mar32	Apr32-Mar33			Total Source
Income:													
Contributory													
Development Phase - Contributory Income Total		531,755	307,184	0	0	0	0	0	0	0			838,939
Delivery Phase - Contributory Income Total		0	0	2,772,966	2,772,966	0	0	0	0	0			5,545,933
Commercial													
Delivery Phase - Commercial Income Total		29,757	30,186	28,524	29,095	29,677	30,270	30,876	31,493	32,123			
Other Income		10,000	63,371	65,164	188,487	295,782	67,903	68,125	77,762	78,188			
TOTAL INCOME		571,512	400,741	2,866,654	2,990,548	525,597	298,334	195,027	398,594	399,673			
Expenditure													
New Staff Costs (Total)		91,007	141,179	81,642	82,512	54,192	55,276	176,382	179,909	183,508			
Dev.Phase Costs (Exc.Staff)													
Total - Dev.Phase Costs (Exc.Staff)		100,029	100,029	0	0	0	0	0	0	0			
Gap-Funding for New Staff Between Development & Delivery Phases		0	0	16,948	0	0	0	0	0	0			33,955
Total - Del.Phase Costs (Exc.Staff)		0	0	2,189,795	3,284,693	0	0	0	0	0			
Sub-total Overheads		75,813	51,255	47,149	48,008	105,329	107,131	123,410	125,678	127,991			
TOTAL EXPENDITURE		548,157	573,771	2,335,534	3,415,212	159,522	162,408	299,791	305,587	311,499			
NET INCOME LESS EXPENDITURE		23,355	-173,029	531,120	-424,664	366,075	135,926	-104,764	93,007	88,174			
SINKING FUND		50%				183,037	67,963	-52,382	46,503	44,087			
PROFIT LESS SINKING FUND						183,037	67,963	-52,382	46,503	44,087			
CASHFLOW - OPENING BALANCE		178,000	201,355	28,325	559,446	134,782	925,521	270,708	820,757	363,714	908,930		

6.2.1 Assumptions

CURRENT ASSUMPTIONS		Source				2024	Develo pment	Delive ry	Deliv ery	YR1	YR2	YR3	YR4	YR5		
Income/Revenue:																
Model 1 - Monthly Flat Rental Model Agent consultation has revealed that given the St Osyth venue is not yet established, it may be rented on a stepped rental seeing a reduced rate for the first three years that will then increase. We have been advised that the rental increase will be significant across the first 3 years. Rental Estimates: there is a lack of transactional evidence of venues, A/V also looked at current units for sale to supplement the lease data. They have been advised by agents that an appropriate rental yield for the property will be between 10.0% and 12.0%. The market rent for established wedding barns is considered to be £13.50 psqft. In its current/ starting state, they have adopted a value of £0.75 psf for the Tithe Barn and the Cart Lodge on a storage use basis. The Old Dairy, given that it has an electricity supply and is in better condition is priced at £1.50 psf. This equates to an annual rental income of £2,474 for the Tithe Barn, £807 for the Cart Lodge, and £1,743 for the Old Dairy. (Total £5,024 pa). Based on annual increases we can then project how that changes.																
						2024 / Devpt	Develo pment	Delive ry	Deliv ery	YR1	YR2	YR3	YR4	YR5		
Tithe Barn Rental - 3299 sq ft (Current value psqf - £0.75); rising to £13.50 psqf after development, with stepped increase in rent by 25%, 50%, 75% and 100%		Aspinall Verdi				£2,474	£2,474	£0	£0	£22,268	£27,835	£33,402	£38,969	£44,537		4340.79 per month for Tithe Barn & Dairy
Dairy Rental - 1162 sq ft (Current value psqf - £1.50); rising to £6.75 psqf after development - is this different due to usage as kitchen? Assume 50% with stepped increase in rent by 25%, 50% and 100%. Assumed half value psqf due to being kitchen area after development		Aspinall Verdi				£1,743	£1,743	£0	£0	£3,777	£4,721	£5,665	£6,609	£7,553		
Cart Lodge Rental - 1076 sq ft (Current value psqf - £0.75); rising to £13.50 psqf after development with stepped increase in rent by 25%, 50% and 100%		Aspinall Verdi				£807	£807	£0	£0	£0	£807	£807	£807	£807		Excluded from project
						£5,024	£5,024	£0	£0	£26,045	£33,363	£39,874	£46,385	£52,897		
		Equates to 6 weddings in Y1, 7 in Y2, 8 in Y3, 10 in Yr 4 and 11 in Yr 5								4.21	5.40	6.45	7.51	8.56		
Model 2 - Direct Operation Model Fee Per Hire - Aspinall Verdi - IF the model suggests we charge a fee p/hire to Black Jacket, and to ensure we are not undercutting what the Trust could earn through longer term lease. There is also the question of costs and what is included / not included.																
						2024 / Devpt	Develo pment	Delive ry	Deliv ery	YR1	YR2	YR3	YR4	YR5		
		Maximum Availability for Weddings - See Catering / Venue Hire Assumptions								311	311	311	311	311		
		Estimated number per year								49	98	98	102	131		
		Total Estimated Wedding Days x Avg Direct Hire Cost - Aspinall Verdi								£302,820	£605,640	£605,640	£630,360	£809,580		

Lowest achieved day rate (low season0																			
Highest achieved day rate (high season)		£3,000.00																	
Average day rate across all seasons		£8,500.00																	
		£6,180.00																	
Model 3 - % Split This is a typical model in the venue hire / catering industry and has been modelled based on Low, Mid and High Season rates to customer and capacity thresholds. We have included approximately 15% of available capacity to community events across all seasons. Hire rates are based on Braxted Park Rate Card (Similar size historic wedding venue within 25 miles)																			
						2024 / Devpt	Develo pment	Delive ry	Deliv ery	YR1	YR2	YR3	YR4	YR5					
Venue Hire (Hourly)		Tricolor								£13,500	£13,650	£13,800	£13,800	£13,950					
Low Season		Tricolor								£142,750	£142,750	£197,000	£234,250	£234,250					
Mid Season		Tricolor								£429,375	£429,375	£429,375	£634,125	£634,125					
Hlgh Season		Tricolor								£748,625	£748,625	3	£1,046,750	£1,046,750					
Subtotal Venue Hire Income on 15% split										£1,334,250	£1,334,400	£640,178	£1,928,925	£1,929,075					
Scenarios based on fees % variance		15%								£200,138	£200,160	£96,027	£289,339	£289,361					
		10%								£133,425	£133,440	£64,018	£192,893	£192,908					
		7.50%								£100,069	£100,080	£48,013	£144,669	£144,681					

6.2.3 Sensitivity Analysis

Assumptions for Commercial Income		2028 YR1	2029 YR2	2030 YR3	2031 YR4	2032 YR5	2033 YR6	2034 YR7	2035 YR8	2036 YR9	2037 YR10	Total
Venue Hire - Event Space		Assumed 6 months only to account for capital over-run										
Conference Event Hire -- Non Wedding - Weekdays Only (total capacity = 150)		All Year										
- Hourly Rate	8 hour hire £20.00	4 hour hire £25.00										
- Average Event Length (hours)			£25.00	£27.50	£30.00	£30.00	£32.50	£32.50	£35.00	£35.00	£35.00	
- Weekly Frequency			4	4	4	4	4	4	4	4	4	
- Total Number Annually			15	15	15	15	15	15	15	15	15	
- Catering / Head			£20.00	£20.00	£20.00	£20.00	£20.00	£20.00	£20.00	£20.00	£20.00	
- Average # of People			80	80	80	80	80	80	80	80	80	
- Annual Income			£6,750	£13,500	£13,800	£13,800	£13,950	£13,950	£14,100	£14,100	£14,100	
SUB-TOTAL HIRES (LOW SEASON)			15	15	15	15	15	15	15	15	15	15 OUT OF 159 DAYS AVAILABLE
SUB-TOTAL RETURN			£13,500	£13,650	£13,800	£13,800	£13,950	£13,950	£14,100	£14,100	£14,100	
Traditional Wedding (Saturdays) -- (total capacity = 150)		Low Season	Wedding Breakfast plus toast, reception									
- Hourly Rate	2028	Catering per Head										
- Average Event Length (hours)	£4,000.00	£100.00										
- Weekly Frequency			£333.33	£333.33	£333.33	£333.33	£333.33	£333.33	£333.33	£333.33	£333.33	
- Total Number Annually			12	12	12	12	12	12	12	12	12	
- Catering / Head			0.25	0.5	0.5	0.75	0.75	0.75	0.75	0.75	0.75	
- Average # of People			5	5	7	7	7	10	10	10	10	OUT OF 12 AVAILABLE
- Annual Income			£100.00	£100.00	£100.00	£110.00	£110.00	£115.00	£115.00	£120.00	£120.00	
			100	100	100	100	100	100	100	100	100	
			£35,000	£70,000	£70,000	£98,000	£105,000	£105,000	£155,000	£155,000	£160,000	
Traditional Wedding (Fridays) -- (total capacity = 150)		Low Season										
- Hourly Rate	2028	Catering per Head										
- Average Event Length (hours)	£3,500.00	£100.00										
- Weekly Frequency			£291.67	£291.67	£291.67	£291.67	£291.67	£291.67	£291.67	£291.67	£291.67	
- Total Number Annually			12	12	12	12	12	12	12	12	12	
- Catering / Head			0.25	0.5	0.5	0.75	0.75	0.75	0.75	0.75	0.75	
- Average # of People			1	1	2	2	2	3	3	3	3	OUT OF 12 AVAILABLE
- Annual Income			£100.00	£100.00	£100.00	£110.00	£110.00	£115.00	£115.00	£120.00	£120.00	
			100	100	100	100	100	100	100	100	100	
			£6,750	£13,500	£13,500	£27,000	£29,000	£29,000	£45,000	£45,000	£46,500	
Traditional Wedding (Sundays) -- (total capacity = 150)		Low Season										
- Hourly Rate	2028	Catering per Head										
- Average Event Length (hours)	£2,750.00	£100.00										
- Weekly Frequency			£229.17	£229.17	£229.17	£229.17	£229.17	£229.17	£229.17	£229.17	£229.17	
- Total Number Annually			12	12	12	12	12	12	12	12	12	
- Catering / Head			0.25	0.5	0.5	0.75	0.75	0.75	0.75	0.75	0.75	
- Average # of People			1	1	2	2	2	3	3	3	3	OUT OF 12 AVAILABLE
- Annual Income			£100.00	£100.00	£100.00	£110.00	£110.00	£115.00	£115.00	£120.00	£120.00	
			100	100	100	100	100	100	100	100	100	
			£6,375	£12,750	£12,750	£25,500	£27,500	£27,500	£42,750	£42,750	£44,250	
Traditional Wedding (Mon to Thurs) -- (total capacity = 150)		Low Season										
- Hourly Rate	2028	Catering per Head										
- Average Event Length (hours)	£2,000.00	£100.00										
- Weekly Frequency			£166.67	£166.67	£166.67	£166.67	£166.67	£166.67	£166.67	£166.67	£166.67	
- Total Number Annually			12	12	12	12	12	12	12	12	12	
- Catering / Head			0.25	0.5	0.5	0.75	0.75	0.75	0.75	0.75	0.75	
- Average # of People			2	2	2	3	3	3	5	5	5	OUT OF 31 AVAILABLE
- Annual Income			£100.00	£100.00	£100.00	£110.00	£110.00	£115.00	£115.00	£120.00	£120.00	
			100	100	100	100	100	100	100	100	100	
			£12,000	£24,000	£24,000	£24,000	£39,000	£39,000	£40,500	£67,500	£70,000	
Venue Hire Only - No Catering		Low Season										
- Hourly Rate	2028 - Average	Saturday										
- Average Event Length (hours)	£11,250.00	£17,500.00										
- Weekly Frequency		Friday										
- Total Number Annually												
- Catering / Head		Sunday										
- Average # of People		£10,000.00										
- Annual Income		£7,500.00										
SUB-TOTAL HIRES (LOW SEASON)			11	11	15	17	17	22	26	26	26	26 OUT OF 66 DAYS AVAILABLE
SUB-TOTAL RETURN			£142,750	£142,750	£197,000	£234,250	£234,250	£317,000	£366,500	£377,000	£377,000	SUB-TOTAL RETURN

Traditional Wedding (Saturdays) -- (total capacity = 150)		Mid Season	Wedding Breakfast plus toast, reception									
- Hourly Rate	2028	Catering per Head										
- Average Event Length (hours)	£6,500.00	£100.00										
- Weekly Frequency												
- Total Number Annually												
- Catering / Head												
- Average # of People												
- Annual Income												
Traditional Wedding (Fridays) -- (total capacity = 150)		Mid Season										
- Hourly Rate	2028	Catering per Head										
- Average Event Length (hours)	£5,500.00	£100.00										
- Weekly Frequency												
- Total Number Annually												
- Catering / Head												
- Average # of People												
- Annual Income												
Traditional Wedding (Sundays) -- (total capacity = 150)		Mid Season										
- Hourly Rate	2028	Catering per Head										
- Average Event Length (hours)	£5,000.00	£100.00										
- Weekly Frequency												
- Total Number Annually												
- Catering / Head												
- Average # of People												
- Annual Income												
Traditional Wedding (Mon to Thurs) -- (total capacity = 150)		Mid Season										
- Hourly Rate	2028	Catering per Head										
- Average Event Length (hours)	£3,000.00	£100.00										
- Weekly Frequency												
- Total Number Annually												
- Catering / Head												
- Average # of People												
- Annual Income												
Venue Hire Only		Mid Season										
- Hourly Rate	2028 - Average	Saturday										
- Average Event Length (hours)	£12,375.00	£18,000.00										
- Weekly Frequency		Friday										
- Total Number Annually		£11,500.00										
- Catering / Head		Sunday										
- Average # of People		£11,500.00										
- Annual Income		Weekday										
		£8,500.00										
SUB-TOTAL HIRES (MID SEASON)												
SUB-TOTAL RETURN												
Traditional Wedding (Saturdays) -- (total capacity = 150)		High Season	Wedding Breakfast plus toast, reception									
- Hourly Rate	2028	Catering per Head										
- Average Event Length (hours)	£9,000.00	£100.00										
- Weekly Frequency												
- Total Number Annually												
- Catering / Head												
- Average # of People												
- Annual Income												
Traditional Wedding (Fridays) -- (total capacity = 150)		High Season										
- Hourly Rate	2028	Catering per Head										
- Average Event Length (hours)	£8,000.00	£100.00										
- Weekly Frequency												
- Total Number Annually												
- Catering / Head												
- Average # of People												
- Annual Income												
Traditional Wedding (Sundays) -- (total capacity = 150)		High Season										
- Hourly Rate	2028	Catering per Head										
- Average Event Length (hours)	£7,500.00	£100.00										
- Weekly Frequency												
- Total Number Annually												
- Catering / Head												
- Average # of People												
- Annual Income												

Commission Sensitivity												
	50.0%											
Total at 50/50 split		E0	E667,125	E667,200	E320,089	E964,463	E964,538	E1,026,413	E1,417,988	E1,452,488	E1,452,488	E6,027,814
		E0	E667,125	E667,200	E320,089	E964,463	E964,538	E1,026,413	E1,417,988	E1,452,488	E1,452,488	
	20.0%											
Total at 20%		E0	E266,850	E266,880	E128,036	E385,785	E385,815	E410,565	E567,195	E580,995	E580,995	E2,411,126
		E0	E266,850	E266,880	E128,036	E385,785	E385,815	E410,565	E567,195	E580,995	E580,995	
	10.0%											
Total at 10%		E66,713	E133,425	E133,440	E64,018	E192,893	E192,908	E205,283	E283,598	E290,498	E290,498	E1,272,275
		E66,713	E133,425	E133,440	E64,018	E192,893	E192,908	E205,283	E283,598	E290,498	E290,498	
	5.0%											
Total @ 5%		E33,356	E66,713	E66,720	E32,009	E96,446	E96,454	E102,641	E141,799	E145,249	E145,249	E636,138
		E33,356	E66,713	E66,720	E32,009	E96,446	E96,454	E102,641	E141,799	E145,249	E145,249	
	2.5%											
Total @ 2.5%		E16,678	E33,356	E33,360	E16,004	E48,223	E48,227	E51,321	E70,899	E72,624	E72,624	E318,069
		E16,678	E33,356	E33,360	E16,004	E48,223	E48,227	E51,321	E70,899	E72,624	E72,624	

Total Days per Low Season Available	Low Season - Jan, Feb, Nov (1 Sunday removed for community event, 17 weekdays removed for community events)	12	12	11	31	
Total Days per Mid Season Available	Mid Season - Mar, Apr, Oct, Dec (2 Sundays removed for community events, 16 weekdays removed for community events)	20	20	18	64	TOTAL AVAILABLE
Total Days per High Season Available	High Season - May, June, July, Aug, Sept (1 Sunday removed for community event, 16 weekdays removed for community events)	20	20	19	64	311

6.3 Sensitivity Analysis: Three Core Commercial Models

Based on the Aspinall Verdi valuation, there are 3 core ways in which the Profit and Loss and commercial agreements could be modelled. For the illustrations above, we have selected Model 3, based on the % split as this is most commercially sound and commonly used at comparative locations where events are run from heritage buildings. This is for discussion and refinement during the development phase, as part of the business modelling and initial operator negotiations.

6.3.1 Model 1 - Monthly Flat Rental Model

Agent consultation has revealed that given the St Osyth venue is not yet established, it may be rented on a stepped rental seeing a reduced rate for the first three years that will then increase. We have been advised that the rental increase will be significant across the first 3 years.

Rental Estimates: there is a lack of transactional evidence of venues, Aspinall Verdi also looked at current units for sale to supplement the lease data. They have been advised by agents that an appropriate rental yield for the property will be between 10.0% and 12.0%. The market rent for established wedding barns is considered to be £13.50 sqft. In its current/starting state, they have adopted a value of £0.75 psf for the Tithe Barn and the Cart Lodge on a storage use basis. The Old Dairy, given that it has an electricity supply and is in better condition is priced at £1.50 psf. This equates to an annual rental income of £2,474 for the Tithe Barn, £807 for the Cart Lodge, and £1,743 for the Old Dairy. (Total £5,024 pa). Based on annual increases we can then project how that changes for the two completed buildings; the Cart Lodge will remain suitable for some types of storage only until full restoration is achieved.

6.3.2 Model 2 - Direct Operation Model

Fee Per Hire - Aspinall Verdi - if the model suggests we charge a fee p/hire to Black Jacket, and to ensure we are not undercutting what the Trust could earn through longer term lease. There is also the question of costs and what is included / not included.

6.3.3 Model 3 - % Split

This is a typical model in the venue hire / catering industry and has been modelled based on Low, Mid and High Season rates to customer and capacity thresholds. We have included approximately 15% of available capacity to community events across all seasons. Hire rates are based on Braxted Park Rate Card (Similar size historic wedding venue within 25 miles).

7. RISK REGISTER

A risk register for the St Osyth Priory & Parish Trust Past Preserved Project is available here:

https://docs.google.com/spreadsheets/d/12A6CTRxo75XYsqe_h_ti2VS5BT0e2ed6bpV2vWAYr0k/edit?usp=drive_link

8. MONITORING & EVALUATING

8.1 General Approach

Our previous CRF/ NLHF project experience to date has helped us develop our evaluation skills so that when interpretation, activities and events are developed, this happens with evaluation built in from the outset so that we can meaningfully measure the impact of the project on people and communities against outcomes.

The Trust has already begun to consider what success would look like and how it could be measured through the creation of the draft activity plan included in our supporting documents.

Collection strategies will include both qualitative and quantitative and we have developed SMART targets and KPIs for the activities so that we can meaningfully measure impact

In addition to considering evaluation from the start of the project, the PM brief includes evaluation to ensure this is assessed independently and embedded throughout all that we do. This will include the creation of a project evaluation plan that includes identification of key review points that allow us to adjust our approach as necessary.

We have already created an outline activity grid, included as part of our supporting documentation, and the consultant will create a project Theory of Change for the project to underpin our evaluation and ensure we consistently work towards clear project outcomes, as part of an iterative process.

We would also look to embed our project learning throughout our networks. Michelle Behr is a member of The Georgian Group and SAVE Britain's Heritage, and could use these platforms to talk about, share learnings from and evaluate this NLHF project. The St Osyth Priory site is also a member of Historic Houses, and we would similarly look to share our learnings through their networks.

Additionally, we have previously been invited to speak to the Ambitious Women in Essex Network and engage with the Essex County Council Economic Growth and Localities forum, which would also be high profile ways to cement the project legacy and learning.

We would also ensure that we updated our Lessons Learned document to embed ongoing organisational improvement.

8.2 Note on Proposed Evaluation Framework

As part of the project costs, we will be recruiting an Evaluation Consultant, who will also be tasked with capturing data related to Economic and Social Impact. Forming part of their brief, we would like the project's framework to draw on, and ensure consistency with, HM Treasury's 'Green Book', 'Magenta Book' and National Lottery Heritage Fund guidance ensuring it will support:

1. Quarterly progress monitoring
2. Impact data production after one year showing the community impact of the fund including:
 - a. Improved community asset usage
 - b. Support for businesses and community organisations
 - c. Job and volunteering opportunity creation
 - d. Service delivery
 - e. Access improvements
3. Project contributions to the national evaluation of the fund
4. Capture and use of lessons learnt
5. Future investment options

The evaluation should involve a mixed method approach to build a wide ranging qualitative and quantitative dataset that is created through the following evaluation tasks:

1. Collaborative research tool design
2. Visitor / participant Surveys
3. Participant and Volunteer Interviews
4. Partnership and Stakeholders Surveys with all organisations and community/volunteer groups engaged in the project.
5. Delivery Staff Interviews and Workshops
6. 360° Case Studies
7. Site Visits by the evaluation team.

Following this or a broadly aligned methodology, this data collection will ensure the Past Preserved project demonstrates its success in terms of:

1. Increased usage of heritage assets and associated services and activities on site - measured by activity attendance, footfall and community group use.
2. Participant and volunteer reported levels of increased local participation in community life, arts and culture, including additional volunteering activity.
3. Participant reporting of the impact on improvements in physical and/or mental health, wellbeing, reduced loneliness and social isolation arising from their participation in activities on site.
4. Additional economic impact outcomes including:
 - a. Jobs saved and/or created
 - b. Volunteering opportunities sustained or created
 - c. Improvements in skills and employability of those supported by activities on site.

9. ORGANISATIONAL IMPACT ASSESSMENT

The outcomes of the Past Preserved project are in perfect alignment with the outcomes we are seeking to achieve as an organisation as a whole; to preserve and restore important heritage buildings on the St Osyth Priory estate, bringing them into use for the community and for educational purposes while creating commercial income to sustain their operation . The commercial success of the completed Tithe Barn and Old Dairy complex will help to underpin the sustainability of the Trust and ensure the long term achievement of our vision.

9.1 Management of Costs

We have included assumptions around our increased utility and maintenance costs within our P&L, some of which will be met as part of our agreement with Black Jacket as the venue operator. We have also modelled out the impact of additional staffing costs on our project in order to deliver, manage and coordinate the day to day running of the buildings.

Main responsibilities will be maintaining high levels of community engagement and activity while managing bookings for the usage of the spaces to ensure maximum commercial return.

9.2 Additional Volunteer Input

In 2023, from our volunteer team of 74, volunteer hours contributed amounted to 868. We would expect an uplift in these hours during the course of the Past Preserved project, and have calculated this based on the Activity Action Grids - which includes 1500 Skilled Volunteer Hours in development and 3000 in delivery, as well as contributions from Trustees as Professional Volunteers. In addition to increasing volunteer hours contributed, we anticipate increasing the volunteer workforce by a minimum of 10 new volunteers.

We have engaged with the volunteers as part of the consultation process, and have received positive feedback as well as early interest from volunteers in terms of recording and collating oral histories and interpreting the history of the site to support the role of the Historian in Residence

Volunteers will undertake regular evaluation so their learning and skills development can be recorded, as well as monitoring of hours worked, and demographic information to record any changes in diversity of the volunteer pool.

9.3 Community Networks and Potential Impact on Audiences

We are very clear that, through programming and broadening our reach through education and community engagement, we can make a tangible difference on skills development and the creation of opportunities for people in the communities that surround us, which face some of the highest levels of deprivation in the UK and all the challenges which that brings. We will ensure that as part of the Evaluation brief, we are monitoring our Social and Economic Impact to ensure that we are contributing effectively to the ambitions of the wider business plan, and that we are making a genuine and measurable impact and difference to the local communities in Clacton and Jaywick.

Through our Education Centre, we have already been targeting the development of relationships with the following groups.

St. Osyth Museum

We have established a strong connection with St. Osyth Museum and work closely together to share resources, research and to lead trips and visits. Volunteers often support both organisations and the Education Centre benefits from the knowledge museum volunteers bring to our work. The Education Centre is enhanced by the displays and interpretation boards and information created by the Museum and it adds greatly to our classroom environment. We work to promote one-another in our marketing and to our visitors.

Having a Museum in the village is a real asset to the community and we are keen to work closely with them to ensure their success and continue to share their resources and expertise. The new spaces in the Tithe Barn complex will further unlock opportunities for related events and activities.

Colne Community School

We have established strong connections with the Colne Community School, working closely with the History Department staff to offer learning experiences that are relevant to their curriculum and GCSE exam board. The links began with the school visiting the Priory with their Year 7 cohort and the teachers seeing the engaging way in which our staff taught about Medieval Medicine. This is a topic covered at GCSE level as part of the topic on Public Health through the ages. The school staff were keen to work with us to be able to offer this same experience to the GCSE cohort on the school site as a way to engage and inspire young people on this topic.

We worked closely with the school staff to create a session that we delivered at the Colne Community school to all 158 students. This was such a success that they would like us to repeat this lesson for their Year 9 cohort. The school has been very enthusiastic about the benefits we bring to the learning of their students and are keen to expand our relationship and ensure these opportunities become fixtures in the school calendar and curriculum.

Young Carers at St. Osyth Church of England Primary School

We have created a partnership with St. Osyth Church of England Primary School to provide activities and respite for pupils who have a caring role for family members. This would be for 9 two-hour sessions throughout the school year. 1 in 5 Children and young people take on caring duties in the home because of a disabled parent or sibling. 1 in 8 are under eight years old. This can be completing practical tasks, like cooking, housework and shopping, physical care, such as helping someone out of bed, emotional support, including talking to someone who is distressed, personal care, such as helping someone dress, and looking after

siblings. Young carers are likely to have significantly lower educational attainment than their peers and often report feeling isolated and misunderstood. Support groups for young carers give children a much better chance at succeeding in all areas of life. There isn't currently any provision at St. Osyth Church of England Primary School for young carers but the leadership team recognise the need and are keen to work with St. Osyth Priory Education Centre to put

support in place. St. Osyth Church of England Primary School will identify pupils who have a caring role within their family and who would benefit, a maximum of 20 across the year groups.

Sessions will vary throughout the year and will be designed to create connection and community among the pupils to promote peer support. There will be time for the pupils to get to know one another better and feel understood about the different situations they face. The sessions will provide much-needed freedom from caring responsibilities, as well as reducing isolation and promoting wellbeing. The opportunities to financially support and extend this work into the new spaces will be expanded hugely through the Past Preserved project.

Essex Book Festival

We are keen to partner with Essex Book Festival to create an exhibition on Reminiscence on St. Osyth Priory. Essex Book Festival invites writers and artists from all over the world to take part in its activities and events. They work with schools and community groups to put on events and writing workshops across the county. Working with them and Arts Council England, we are planning an exhibition focused on a range of artistic and cultural expressions of the community's memories of St. Osyth Priory.

It is planned that this project will include many other creative community groups e.g. Jaywick Creative Writing Group and Historical Societies in the area, and the larger spaces enabled through the Past Preserved project will allow the opportunity for this event to grow exponentially.

Home-start

Home-Start works with families in communities right across the UK to provide support through a team of trained volunteers and experts. We have created a Partnership with Home-start Colchester-Jaywick-Clacton and hosted their family Christmas event in December 2023. They are keen to explore further ways in which we can work together and we are looking at possibilities for further events for families they work with as well as events to support their volunteer team. The larger space available in the Tithe Barn unlocked through this project will be perfectly suited to enabling this.

Doucecroft

Doucecroft School is a specialist co-educational school for children and young people with autism and additional complex needs, age 3 –19 years. We have met with staff from the school on site to discuss how we can create an experience at the Priory to meet the complex needs of their students, an opportunity that can continue to grow through the resources and space made possible through this project.

All Saints, Brightlingsea

The All-Saints' restoration project successfully completed in October 2023 following a 13-month programme of conservation, repair and new build works. The project programme includes the delivery of heritage engagement activities for a wide audience appeal. Focussing on three main areas: Art, History, Heritage, and Nature, with lots of opportunities for the public to participate, ranging from individual pursuits to group sessions. At the Priory Education Centre we are keen to learn from the team at All Saints who are, like

us, embarking on a project of public engagement in History, Heritage, Nature and Art. The Tithe Barn spaces will naturally lend themselves as a home for this public programming.

9.4 Governance and Management

As part of our organisational learning and growth, and in part due to feedback from previous engagement with the NLHF, in the last year we have undertaken a comprehensive governance review to assess our current practices and identify areas for improvement. The review involved input from all our trustees, staff, and volunteers, as well as third-party training and consultancy. We are committed to embedding the principles of good governance into all aspects of our work.

There are now nine trustees on the Board since our last application in 2022, thereby increasing the Trust's resilience and independence exponentially. In response to feedback from our previous submission, the Trust has undertaken an extensive Governance Review, developed a best-practice strategy for continuing to develop our independence and resilience and ensuring we have an actionable implementation plan to continue that growth. We have also updated all our policies and structures, and ensured that risks and conflicts are appropriately recorded and managed.

While we do not plan to change our governance structure or board composition (see Figure 1 in Section 3.3.2), we will continue to review and develop our governance throughout the development phase as part of our commitment and engagement to fulfilling our charitable purpose and operating in a responsible and accountable manner. We have allowed for an additional £30,000 in the development phase to support governance and organisational development and growth, ensuring that training is carried out and that we are scaling in a sustainable way that is fit for purpose and will maximise our ability to meet our charitable objects - the first step towards which is achieving an NLHF Round 1 development grant and getting started on our Past Preserved Project.

10. CONTACT DETAILS FOR YOUR ORGANISATION

Registered Office	29-30 FITZROY SQUARE LONDON W1T 6LQ
Website	https://www.prioryeducationcentre.co.uk
Address	St Osyth Priory & Parish Trust St Osyth Priory The Bury St Osyth Clacton-on-Sea Essex CO16 8GW
Email	admin@prioryeducationcentre.co.uk

11. APPENDICES

Please note that all Appendices are available via HyperLinks Below.

11.1 Governing Document

11.2 Governance Strategy and Action Plan

11.3 Governance Policies

11.4 Letters of Support

11.5 Consultation Report

11.6 Comparator Research

11.7 Plan to Lease Methodology

11.8 Design Scheme

11.9 Cost Plan

11.10 Audited Accounts

11.11 Project P&L and Cash Flow

11.12 Fundraising Strategy

11.13 Risk Register

11.14 Programme

11.15 Procurement Policy

11.16 St Osyth Estate Business Plan - REFERENCE ONLY

11.17 Savills Feasibility Study

11.18 Colliers Options Appraisal

Appendix II: Red Book Valuation

Report and Valuation

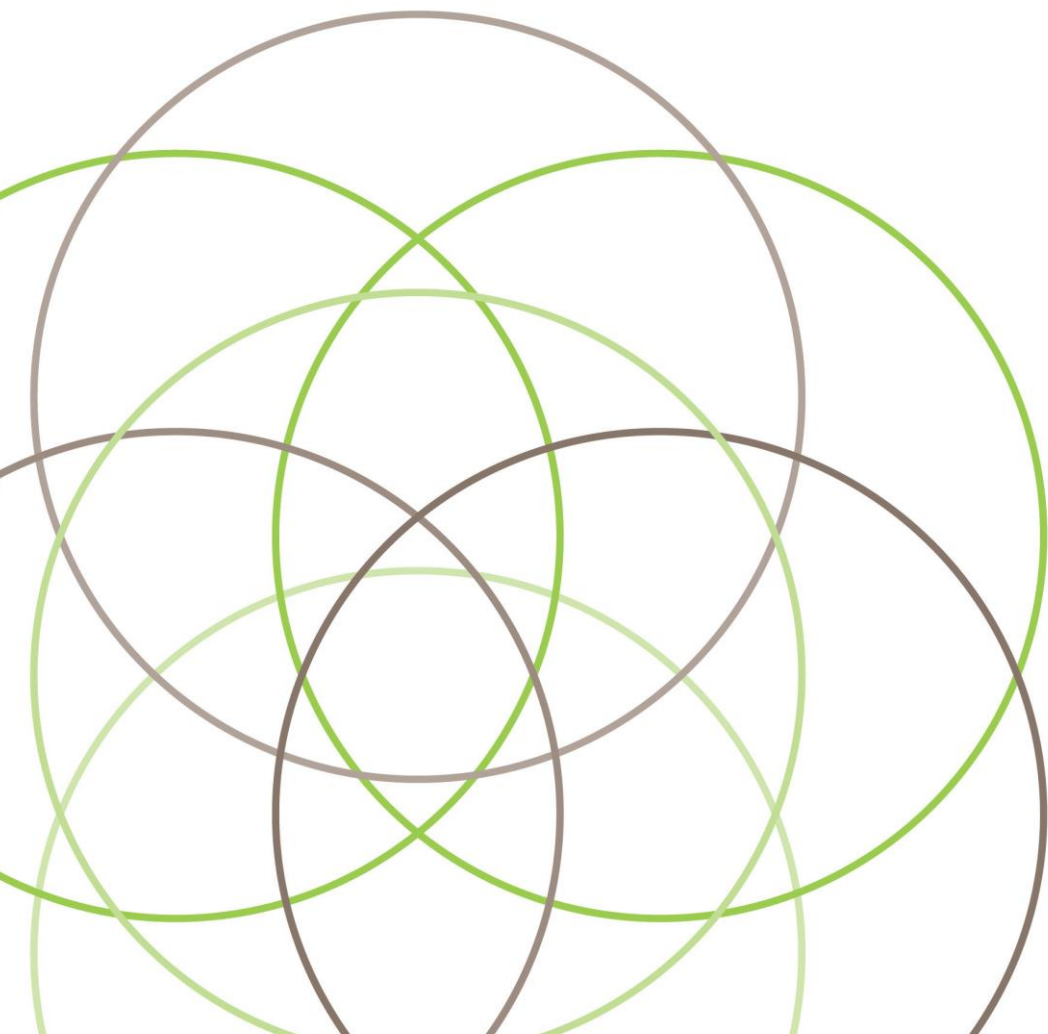
of The Tithe Barn, Cart Lodge,
and The Old Dairy
for

St Osyth Priory and Parish
Trust



February 2024

Private and Confidential



Quality Assurance

Date

13th February 2024

Version

V1

Filename and path

S:_Client Projects\2210 Tithe Barn valuation_St Osyth Priory and Parish
Trust_Reports\2401 Updated Submission\240213 Tithe Barn St Osyth
Priory_Valuation report v0.2_BA review.docx

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Appendix 1 – Terms of Engagement
Appendix 2 – Standard Assumptions
Appendix 3 – Photographs
Appendix 4 – Comparable Market Evidence
Appendix 5 – Valuation Calculations

Executive Summary

- ES 1 This Executive Summary should be read in conjunction with the main report and general assumptions and definitions attached hereto.

Purpose of Valuation

- ES 2 The valuation is required to support a grant funding application to the Heritage Lottery Fund. We understand that you require a valuation as the property currently stands, in its current condition (before), and a valuation on completion of the proposed development (after). The valuation on completion is on a similar vacant possession basis due to the inter-related nature of the operating company/lease.

Property Summary

- ES 3 The property to be the subject of the valuation is:

The Tithe Barn, Cart Lodge, and Old Dairy at St Osyth Priory, West Field Lane, Essex, CO16 8GW.

- ES 4 The property is located at St Osyth Priory Estate and is located in the village of St Osyth, close to Clacton in the Essex district of Tendring. The village is within close proximity to Clacton-on-Sea. There is access to Chelmsford via the A12 and then via the M25 into London.

- ES 5 The site is 4.7 miles from Clacton-on-Sea railway station which provides links into London Liverpool Street in less than 1.5 hours.

- ES 6 We understand that the property is held freehold by the Sargeant family.

- ES 7 The property comprises a derelict Tithe Barn which is in poor condition and in need of repair. It is Grade II* listed and dates back to the 16th Century. The Old Dairy is Grade II listed with repairs needed to the staircase. It is in an otherwise reasonable condition commensurate with its age. The Cart Lodge is Grade II listed and is currently in poor condition.

- ES 8 We understand that the Tithe Barn has a gross internal area (GIA) of 300 sqm, the Cart Lodge is 100 sqm and the Old Dairy is 108 sqm.

- ES 9 St Osyth Priory and Parish Trust have obtained existing planning and listed building consent which was granted in 2015. Planning permission is currently in place for the restoration of the Tithe Barn complex, though the Trust acknowledges that this may need to be altered.

ES 10 The Tithe Barn complex will create a wedding and events space and will need to accommodate guest toilets and a bar area to the south. There will also be a mezzanine floor comprising further corporate space. The Old Dairy is envisaged as a kitchen facility and the Cart Lodge and the main Barn will form the seating areas.

ES 11 You have specifically requested two valuations (i) as the property currently stands, in its current condition (before), and (ii) a valuation on completion of the development (after) to identify the 'uplift in value'.

ES 12 For (ii) you have requested that the valuations be based on the following 'special assumption':

that the development is completed in line with the site plans, floor plans, specifications, and schedule of floor areas provided

SWOT Analysis

ES 13 The SWOT Analysis below provides a succinct summary of the main valuation considerations. Again, this should be read in the context of our main report.

Strengths	<ul style="list-style-type: none"> • Freehold tenure. • Flexibility of possible future uses (community and private uses).
Weaknesses	<ul style="list-style-type: none"> • Current building is in poor condition. • The property has limited access due to current works.
Opportunities	<ul style="list-style-type: none"> • The Tithe Barn complex has planning to become an event space. This scheme has been costed at £6,418,659 • Potential rental income for events space of £89,513.42 per annum based on £13.50 psf.
Threats	<ul style="list-style-type: none"> • The future performance of the subject property as a wedding venue is dependent on development works. • We have not had sight of the operational income and expenditure business plan by the Sargeant Family who will run the complex as a Wedding/Events business on (we assume) an operational 10-year Full Repairing and Insuring Lease with 5 yearly upward only rent reviews. The EBTIDA from these forecasts should support this rental level (with sufficient rent for the landlord and profit/return for the operator) for our valuation to be validated.

Market Value

ES 14 We are of the opinion that the Market Value (MV) of the property particularly described within this report was as follows:

Property	Tenure	Value
Tithe Barn Complex at St Osyth Priory, West Field Lane, Essex, CO16 8GW – <i>Before</i> development	Freehold	£52,000 (Fifty-Two thousand Pounds)
Tithe Barn Complex at St Osyth Priory, West Field Lane, Essex, CO16 8GW – <i>After</i> refurbishment	Freehold	£895,000 (Eight Hundred and Ninety-Five Thousand Pounds)

ES 15 The date of the above valuation is 13th February 2024.

ES 16 We stress the importance of the valuation date as recent experience has shown that property values may change quite significantly over a relatively short period of time.

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St Osyth
Clacton
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stephanie@aspinallverdi.co.uk
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For the Attention of Conrad Payne, Chair of the Trustees

Dear Sir/Madam,

1 Introduction

- 1.2 We refer to your instructions dated 11th January 2024 requesting updated valuation advice in respect of the freehold interest in the property below. This is to update our earlier value advice contained in a report dated 7 November 2022.
- 1.3 The subject property is The Tithe Barn, The Old Dairy and The Cart Lodge, St Osyth Priory, The Bury, St Osyth, Clacton, Essex CO16 8GW.

The Client

- 1.4 We have been instructed to prepare this report and valuation by St Osyth Priory and Parish Trust who are our clients in respect of this valuation.

Purpose of Valuation

- 1.5 The valuation is required for grant funding purposes. There are proposals to restore the Tithe Barn, the Old Dairy building, and the Cart Lodge and it will be necessary to obtain grant funding to assist with the restoration to be able to put these buildings back into public use. We understand that you require a valuation as the property currently stands, in its current condition (before), and a valuation on completion of the proposed development (after) to identify the 'uplift in value'.

Assets to be Valued

- 1.6 The property to be the subject of the valuation is:
- The Tithe Barn/The Old Dairy/Cart Lodge, St Osyth Priory, The Bury, St Osyth, Clacton, Essex CO16 8GW.

- 1.7 We understand that the subject site is a derelict Tithe Barn which is Grade II* listed as well as the Old Dairy and Cart Lodge which are Grade II listed.

Status of Valuer

- 1.8 This report has been prepared by Stephanie Eaton BSc (Hons) MRICS Director and Ben Aspinall BSc (Hons) MRICS Managing Director, Registered Valuer who has the relevant experience of this type of property and is qualified for the purpose of the valuation.
- 1.9 We carry Professional Indemnity Insurance on a per-claim basis which is adequate in respect of this instruction.

Conflicts of Interest

- 1.10 We have acted as Independent Valuers and we have no conflict of interest in providing this advice. None of the Directors nor employees of Aspinall Verdi Limited have had any other fee-earning relationship with St Osyth Priory and Parish Trust concerning the subject property apart from the fee for this present service (and the previous November 2022 report).

International Valuation Standards (IVS)

- 1.11 Our report and valuation have been carried out in accordance with the latest edition of the RICS Valuation Global Standards ("Red Book") prepared by the Royal Institution of Chartered Surveyors 31st January 2022 (and in accordance with the IVS).

Format of Report

- 1.12 Before providing our valuation opinion, we set our report as follows:

Section 2 -	Basis of Valuation
Section 3 -	Assumptions and Sources of Information
Section 4 -	Tithe Barn Complex Property Report
Section 5 -	Market Commentary & Evidence
Section 6 -	Valuations

- 1.13 We also append:

- a copy of the letter confirming our instructions;
- our standard valuation assumptions;
- a selection of representative photographs;

- comparable market evidence; and
- our valuation calculations.

2 Basis of Valuation

- 2.1 You have specifically requested us to provide you with our opinion of the Market Value of the property.
- 2.2 We understand that you require a valuation as the property currently stands, in its current condition (before), and a valuation on completion of the proposed development (after) in order to identify the 'uplift in value'.

Market Value

- 2.3 Market Value is defined as:

The estimated amount for which an asset or liability should exchange on the valuation date between a willing buyer and a willing seller in an arm's length transaction after proper marketing and where the parties had each acted knowledgeably, prudently and without compulsion.

3 Assumptions and Sources of Information

- 3.1 We set out below details of our inspection of the property, the sources of information relied upon, and the extent of our investigations. We also set out any special assumptions (instructed by the client) and our standard assumptions.

Property Inspection

- 3.2 The inspection of the property was completed at 14:30 on the 19th of October 2022 for the purposes of our initial valuation report (November 2022). We have not reinspected the property as part of this update. We understand that there have been no material changes to the circumstances of the property.
- 3.3 We were not able to gain access to the first floor of the Old Dairy.
- 3.4 The weather was cold, sunny, and dry at the time of the inspection.

Sources of Information Relied Upon

- 3.5 Details of the extent of the property, tenure, permitted uses and related matters have been provided by you. Where possible this information has been checked on-site.

Extent of Investigations

- 3.6 For the avoidance of doubt as part of this commission we:
- Have not examined the structural soundness of the property.
 - We have taken check measurements and photographs
 - Undertaken internal and external inspections.

Special Assumptions

- 3.7 In addition to the above assumptions, you have specifically requested two valuations (i) as the property currently stands, in its current condition (before), and (ii) a valuation on completion of the development (after) in order to identify the 'uplift in value'.
- 3.8 For (ii) you have requested that the valuations be based on the following 'special assumption':
- that the development is completed in line with the site plans, floor plans, specification, and schedule of floor areas provided.
 - the property is with vacant possession and we have not had regard to potential operating lease arrangements which involve inter-company arrangements.

- 3.9 Note that a special assumption is made by the valuer where an assumption either assumes facts that differ from those existing at the valuation date or that would not be made by a typical market participant in a transaction on that valuation date.
- 3.10 Where special assumptions are necessary in order to provide the client with the valuation required, these must be expressly agreed and confirmed in writing to the client before the report is issued.
- 3.11 Special assumptions may only be made if they can reasonably be regarded as realistic, relevant, and valid for the particular circumstances of the valuation.

Standard Assumptions

- 3.12 We set out at Appendix 2 our standard valuation assumptions. These assumptions apply unless explicitly stated otherwise herein.

4 Tithe Barn Complex Property Details

4.1 This section describes the property which is the subject of the valuations.

Description

- 4.2 The property comprises a 2-storey brick-constructed property (the Old Dairy) as well as the Tithe Barn which is part brick, part timber construction, and the Cart Lodge, which is of timber construction.
- 4.3 The Tithe Barn is in a poor state of repair. There are several patches of damage to the exterior of the property that have left the Barn open to the elements. The building has an uneven roof as it has become susceptible to ground movements. The Barn has limited access due to current work being undertaken on-site. Internally there are several instances of patches in the interior that have seen damage. The Barn was also in use at the time of inspection which has hindered internal inspection. Several pigeons as well as their excrement were visible on site.
- 4.4 The Cart Lodge is in poor condition. Access is inhibited by ground works and the storage of materials around the property. The side of the Lodge has seen damage and has been susceptible to ground movements. The Lodge was also in use at the time of inspection which has hindered internal inspection. There are large instances of damage across the front and back of the property which is not water-tight
- 4.5 The Old Dairy seems to be in fair condition externally with vegetation scaling the left-hand side of the property. Works are being carried out to the West side of the building that will inhibit access to the site as well as cause potential disruption. The Old Dairy has a fair internal condition with internal wear and tear on the ground floor. The staircase in the building that leads to the second floor was not in use at the time of the site inspection, due to safety concerns, so the first floor was not viewed.

Figure 4.1 External Site Photographs



South Elevation (Tithe Barn)



North Elevation (Tithe Barn)

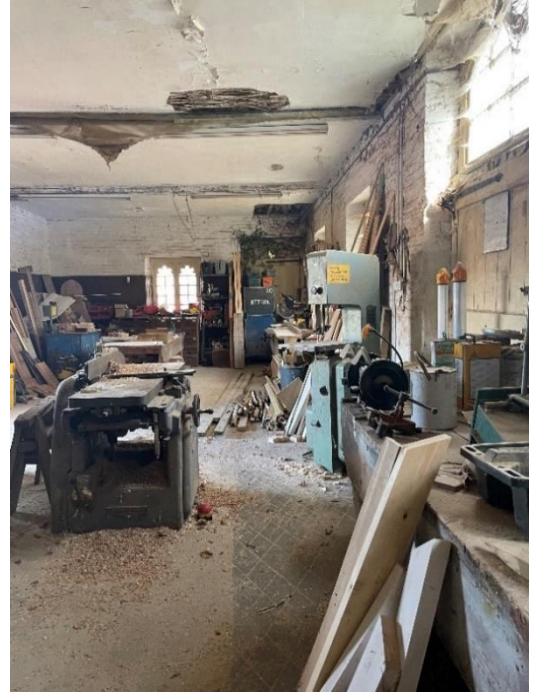


North Elevation (The Old Dairy)



East Elevation (The Old Dairy)

**Figure 4.2 Internal Site
Photographs**



Internal Photograph (Tithe Barn)



External Photographs (Cart Lodge)

Internal Photograph (The Old Dairy)

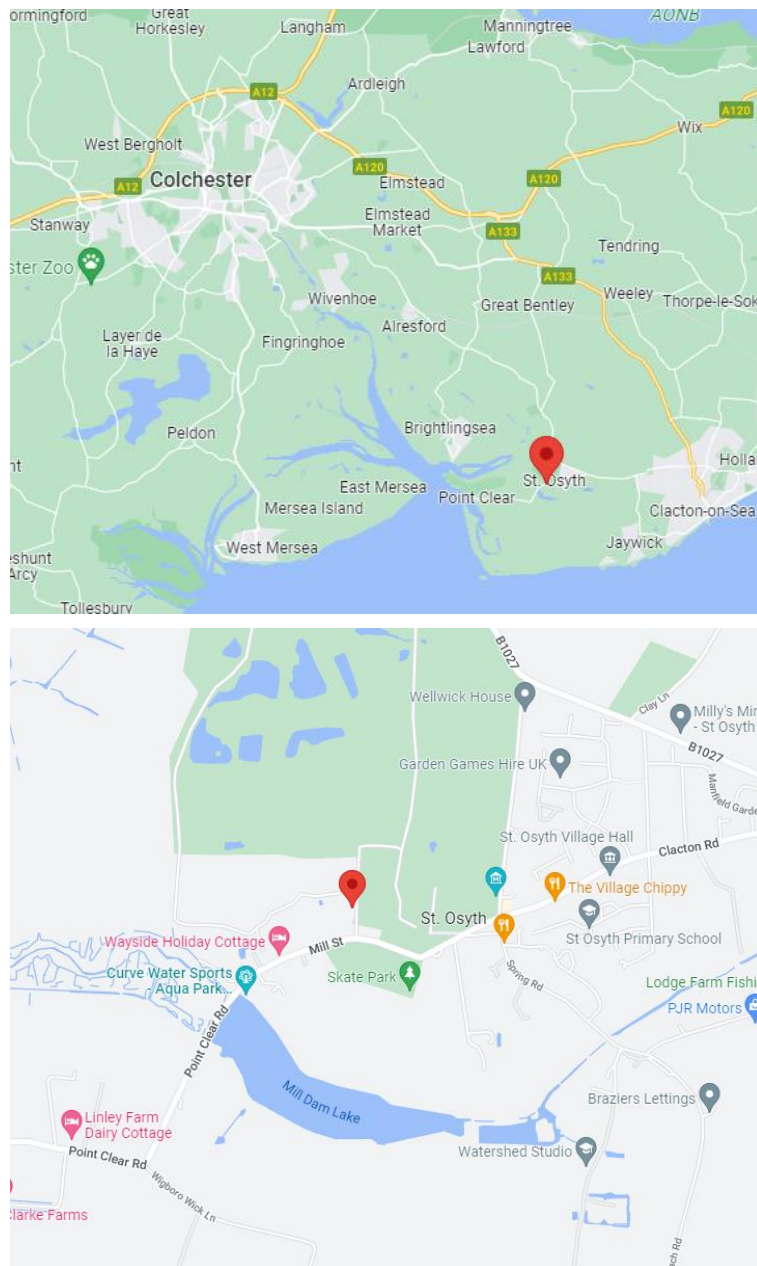


4.7 Additional photographs are included in Appendix 3.

Location

- 4.8 The site is located in St Osyth which is a small village less than 5 miles from Clacton-on-Sea in the Tendring District. The village is small and traditional but has seen a recent residential development on the St Osyth estate.
- 4.9 The location of the property is illustrated on the village and street-level location maps below.

Figure 4.3 Site Location



Source: Google, October 2022.

4.10 The above plans are not to scale and are for illustration purposes only.

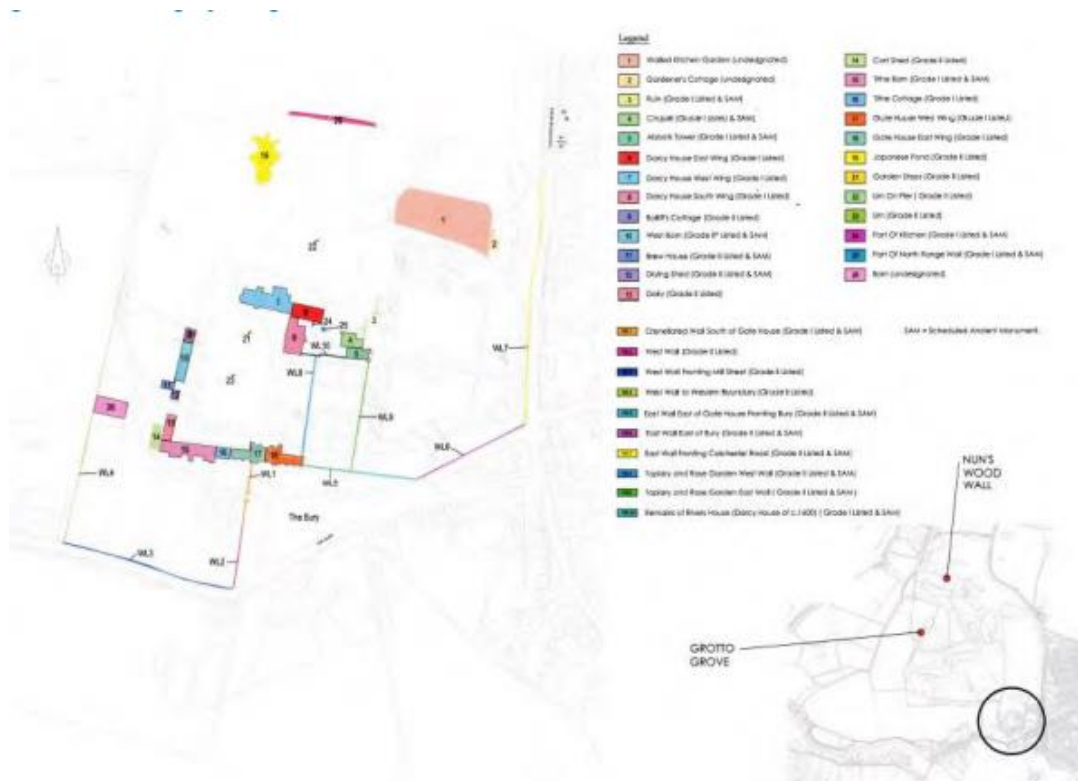
Communications

- 4.11 There are good connections from Clacton-on-Sea railway station from which it takes less than an hour and a half to reach Liverpool Street, London.
- 4.12 St Osyth is approximately 13 miles from Colchester via the A133 and over an hour and a half drive to Cambridge.
- 4.13 The site is a 3-minute walk from the closest bus stop which provides links into Clacton-on-Sea as well as other localities.

The Site

- 4.14 The site is within the grounds of St Osyth Priory with proximity to a new residential development, erected within the grounds to the west of the site. The site is north of the Darcy House and situated alongside the Tithe Cottage. Access to the Tithe Barn complex is granted via West Field Lane.
- 4.15 The full extent of the site and its position within the wider estate is shown in the image below.

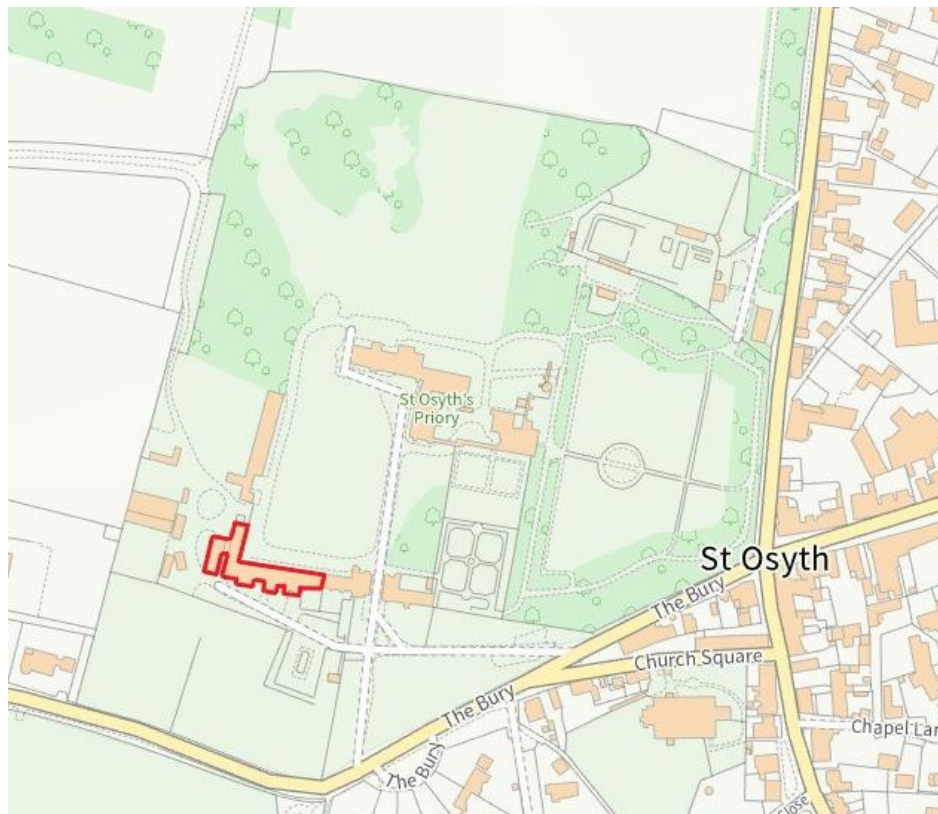
Figure 4.4 Existing Site Plan



Source: Colliers International, 2016

4.16 The above plan is not to scale and is for illustration purposes only.

Figure 4.5 Red Line Plan



Source: Strutt & Parker

- 4.17 The extent of the assets subject to the valuation are illustrated in red on the attached plan. The total red-line site area is 7,728 sqm / 1.91 acres.
- 4.18 Access to the Chapel, Part of the Darcy House, Tithe Barn, and Cart Lodge will be through the Front lawn, Bury, and land to the south of the Tithe Barn. We understand that the subject property will have car parking for events available to it within the grounds of the estates without any restrictions.
- 4.19 We understand that the existing ground-floor area for the Old Dairy, Tithe Barn, and Cart Lodge is circa 508 sqm / 5,468 sqft. We have taken indicative measurements to check the reliability of these figures.

Environmental

- 4.20 Remediation works - We have not been provided with a Site Investigation report, however notwithstanding this, in preparing our opinion of Market Value we have implicitly assumed that

any site remediation works have been/will be completed to an acceptable standard and there are no remaining matters sufficient to affect value or marketability.

- 4.21 Flood risk - We have made enquiries on the Environment Agency website and understand that there is no history of flooding at this site and that it is in a very low-risk area. Accordingly, we have not made any adjustments to our valuation in respect of flood risk.
- 4.22 Asbestos – We are not aware of any asbestos within the subject property.

Accommodation

- 4.23 The property comprises a Tithe Barn of 40m x 7m narrowing to 6m at the west side (and 60m between midstreys) as well as The Old Dairy of 6m x 18m (ground floor only) and The Cart Lodge of 6m x 17m.

Floor Areas

- 4.24 As set out above we have not measured the property. We have checked measurements only, and have relied on the plans and specifications provided. We understand that the existing buildings have a combined gross internal area (GIA) of 508 sqm (the Tithe Barn comprises 300 sqm, the Old Dairy 108 sqm and the Cart Lodge 100 sqm).

Services

- 4.25 We are advised that all of the buildings have been fitted with new updated mains services recently. This includes drains, electricity, gas, BT and water.
- 4.26 We have assumed that as part of the renovation works, the property will be provided with all mains services and have heating, ventilation, fire safety measures, and broadband.

General Condition

- 4.27 The Tithe Barn and Cart Lodge are both in poor condition and are currently not wind and water-tight. There are also several instances of damage along the southern side of the Barn. We have assumed that these will be made good as part of the renovation works.
- 4.28 The Old Dairy is in fair condition on the ground floor with no major or obvious faults other than missing plaster on part of the ceiling exposing timber flooring above. The first floor could not be inspected due to defective stairs.

Energy Performance Certificate (EPC)

- 4.29 Note that from 1 April 2018, landlords of non-domestic private rented properties (including public sector landlords) may not grant a tenancy to new or existing tenants if their property has an Energy Performance Certificate (EPC) rating band of F or G.
- 4.30 From 1 April 2023, landlords must not continue letting a non-domestic property which is already let if that property has an EPC rating of band F or G.
- 4.31 Unless stated otherwise, we assume that on completion the asset is capable of being let (i.e. EPC rating of A – E) and/or has an exemption for historic listed buildings.

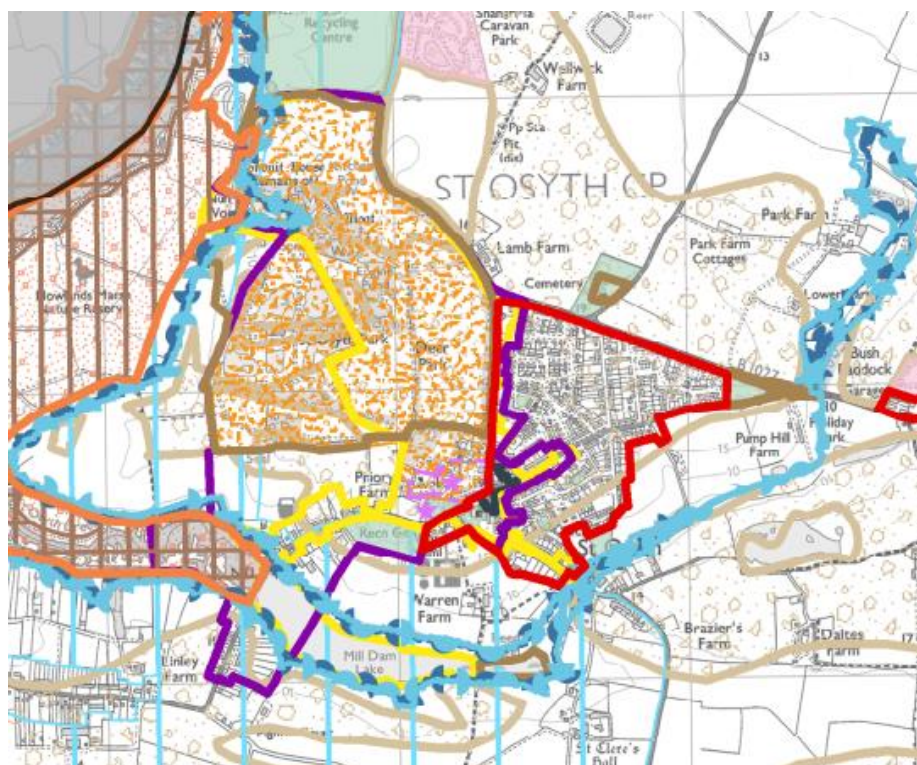
Title and Tenancies

- 4.32 We have had sight of the Title documents and understand that the property is held freehold by the Sargeant family.
- 4.33 The Tithe Barn complex will be leased to the St Osyth Priory and Parish Trust on a 90-year term that we assume will be renewed. The rent will be set at a peppercorn rate.
- 4.34 The Trust will then rent the Tithe Barn complex back to the Sargeant Family who will run the complex as a Wedding/Events business we assume on a 10-year Full Repairing and Insuring Lease with 5 yearly upward only rent reviews. The rent will be set at market rates with a reduction for community event disruptions.
- 4.35 The Trust will reserve the right to hold events throughout the year for community purposes such as a celebration of International Women's Day given the affiliations with St Osyth.
- 4.36 We have not been provided with specific details of these proposed lease arrangements, and for the purposes of this valuation, we have assumed vacant possession (as the various companies are all inter-related).

Rating

- 4.37 The property lies within the jurisdiction of Tendring District Council for rating purposes.
- 4.38 The Valuation Office Agency website does not currently list the Tithe Barn complex as it is not used for business purposes. With the change of use to a venue or storage space, this is likely to change. We have accounted for this fact in our valuation.
- 4.39 It is unclear whether the property is liable for business rates currently given its condition.

- ### Figure 4.6 South East Tendring Policies Map



4.42 In the table below, we review the planning application history for the subject site.

Table 54.1 Planning History of the Site

Reference	Summary	Decision	Decision issued date
21/00799/FUL	Proposed change of use of the historic buildings to form function/wedding venue with supporting kitchen/serving facilities and guest accommodation with associated works and construction of a new car park.	Approval - Full	14 th February 2022
21/00798/LBC	Proposed change of use of the historic buildings to form function/wedding venue with supporting kitchen/serving facilities and guest accommodation with associated works.	Approval- Listed Building Consent	14 th February 2022
14/01009/LBC	Creation of a Visitor Centre in the Tithe Barn, Cart Lodge, Dairy, and adjacent paddock including changes of use to A1, A3, B1, D2 and conference/functions/wedding reception use; construction of extensions; internal and external alterations and all ancillary works shown on the drawings.	Approval – Listed Building Consent	14 th July 2014
14/01008/FUL	Creation of a Visitor Centre in the Tithe Barn, Cart Lodge, Dairy, and adjacent paddock including changes of use to A1, A3, B1, D2 and conference/functions/wedding reception use; construction of extensions; internal and external alterations and all ancillary works shown on the drawings.	Approval- Full	9 th January 2015

Source: AspinallVerdi, 2022

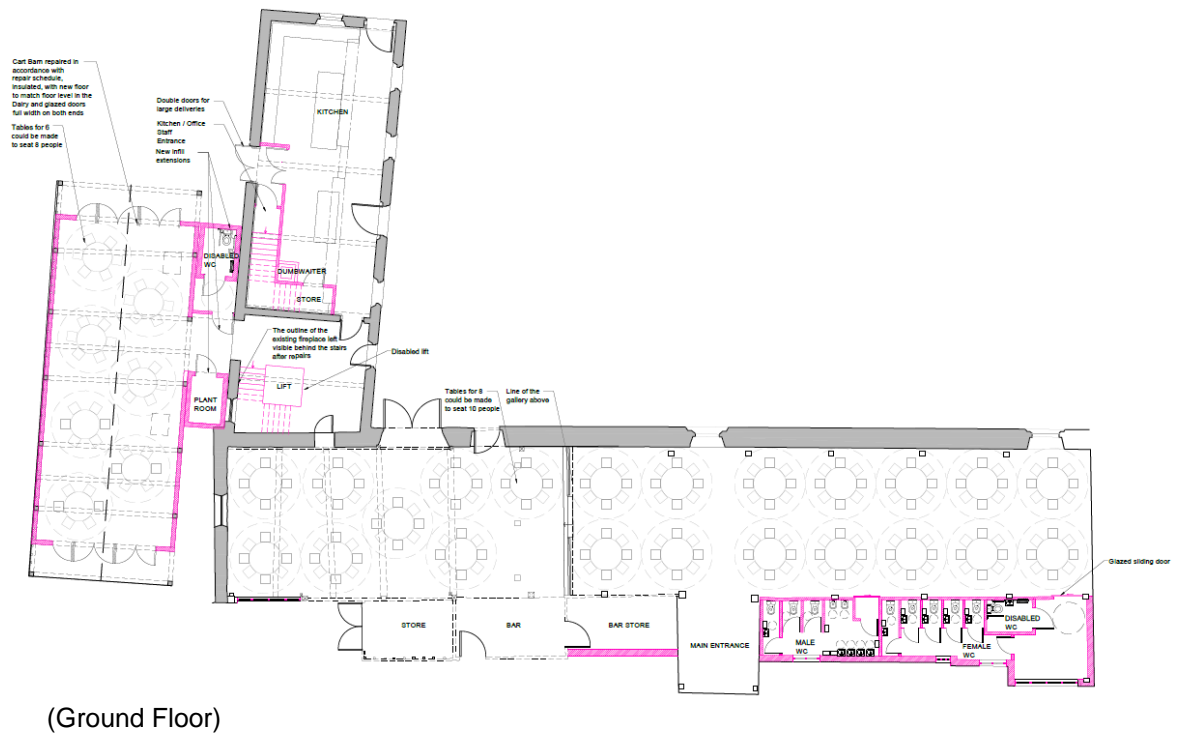
- 4.43 The Tithe Barn Complex currently has planning permission in place for the conversion of existing buildings into a function space / wedding venue with supporting kitchen / serving facilities and guest accommodation with associated works and construction of a new car park.

Proposed Development

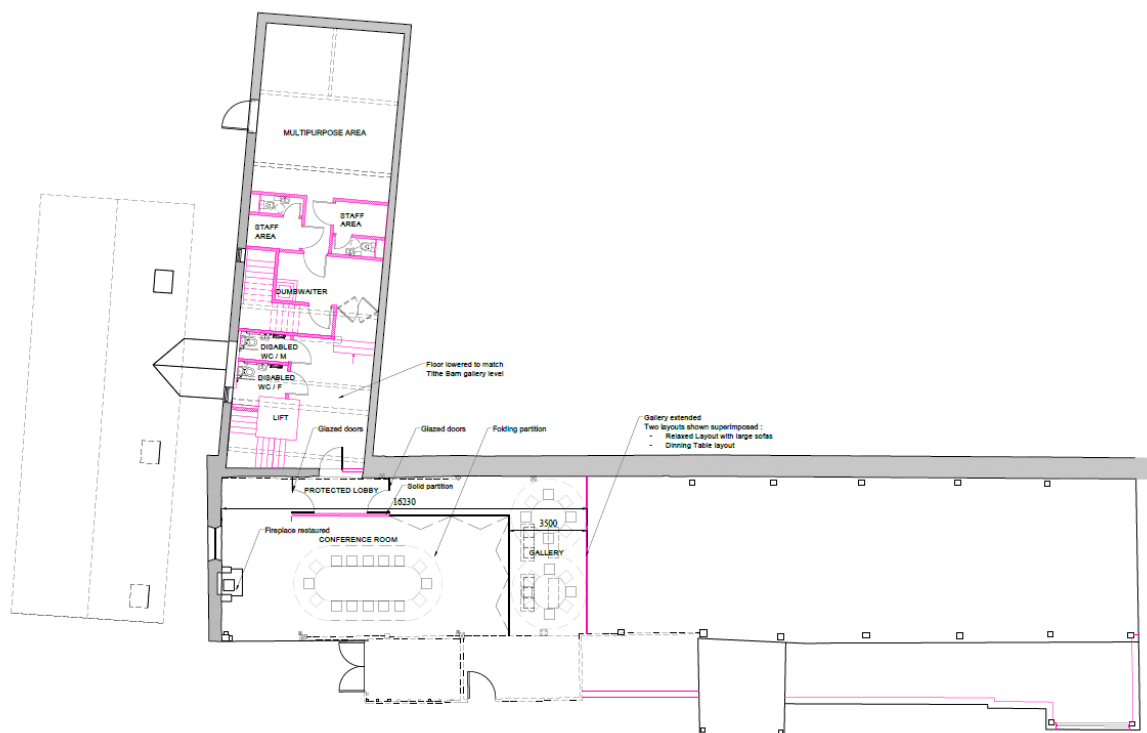
- 4.44 Full planning permission (21/00799/FUL) was granted in early 2022, along with listed building consent for the change in use of the existing historic buildings to form an events/ wedding space with supporting kitchen/serving facilities and guest accommodation with associated works and construction of a new car park.
- 4.45 The centre will provide community as well as private events, with the main function being commercial usage.

- 4.46 The plans would see all buildings renovated and an extension erected from both the Tithe Barn and the Old Dairy to the Cart Lodge to see the connection of all three buildings which would then form the whole events space.

Figure 4.7 Site Plans on Completion



(Ground Floor)



(First Floor)

Source: Carden and Godfrey, Architects, September 2022.

4.47 The total floorspace on completion will be 616 sqm (6,630 sqft). This comprises of:

- The Old Dairy – 216 sqm (2,325 sqft)
- The Tithe Barn – 300 sqm (3,229 sqft)
- The Cart Lodge- 100 sqm (1,076 sqft)

4.48 We understand that the venue is planned to accommodate up to c.300 wedding guests.

4.49 We understand that the total cost of the proposed development of the Tithe Barn complex is £6,418,659 (source: Andrew Morton Associates, 2024).

4.50 We have not been provided with forecast Income and Expenditure accounts for the proposed wedding business.

Taxation

4.51 We are uncertain as to the property's VAT registration status and our valuations exclude VAT.

Value Considerations

- 4.52 We have valued the property (i) as it currently stands, in its current condition (before), and (ii) on completion of the development (after) in order to identify the 'uplift in value'.
- 4.53 For (i) we have considered the income that using the premises as a storage facility could generate on a freehold basis. For the current value, other alternative uses have not been considered due to the condition of the properties as well as the cost of repairs.
- 4.54 For (ii) we have considered the rental income that the commercial venue space would generate on the basis of valuing the freehold with a special assumption that the property will have the appropriate works undertaken to enable the Tithe Barn Complex to be let as a wedding venue. We have also accounted for surrounding works and limited access that will arise due to the continued work on-site.

Yield Considerations

- 4.55 We have considered national yield reports in our valuations.
- 4.56 Knight Frank publish a primary asset yield guide. The latest publication of January 2024 highlights yield expectations based on the asset type of commercial units. For good secondary properties, it highlights the following rates:
- Good Secondary Estates – 6.75 - 7.25%
- 4.57 Knight Frank define secondary assets as those that are of average quality with some capital expenditure required. There is an average letting demand for these units. We consider that the subject properties are at the end of their economic lives and therefore adjustments will need to be made to the adopted yield values. Adjusted yields will also have to account for complications associated with the heritage and listed properties such as difficulties in access and lack of utilities in the Tithe Barn and Cart Lodge.

Method of Sale

- 4.58 We envisage the method of sale appropriate to the property to be by private treaty or auction.

Special Purchasers

- 4.59 A purchaser with a "special interest" (sometimes referred to as a special purchaser) may be defined as someone to whom the property has a particular attraction which it does not have for the general market.

- 4.60 The basis of this valuation is market value, therefore we have disregarded these funding sources and considered what the property would achieve with a willing buyer and a willing seller in an arm's length transaction.
- 4.61 We note that the Freeholder, special purpose vehicle developer – St Osyth Priory and Parish Trust, and the proposed Operator are all inter-related in this case.

Hope Value

- 4.62 "Hope value" is the element of the market value of a property in excess of the existing use value, reflecting the prospect of some more valuable future use or development. It takes account of the uncertain nature or extent of such prospects, including the time which would elapse before one could expect planning permission to be obtained or any relevant constraints overcome, so as to enable the more valuable use to be implemented.
- 4.63 Our valuation of the property 'before' restoration includes an element of hope value given that the buildings are fundamentally not viable in their current condition.

5 Market Commentary & Evidence

- 5.1 We set out below the national, regional, and local property market and economic context for our valuations. Specific details of our valuation approach and reasoning for the property are described in section 6 below.

National Economic Context

- 5.2 2023 has been a challenging year for real estate due to persistent inflation and a 15-year high in interest rates, both of which negatively impacted economic growth. This led to plummeting volumes of commercial real estate (CRE) investment, which hit a decade low, as investors grappled with declining asset values and increased borrowing costs. Yet while 2024 will likely start the same way, there is more to be optimistic about. The inflation rate significantly fell towards the end of 2023 and is expected to continue its downward trajectory. Although it is anticipated that base rates will be high for an extended period, there is the prospect of interest rate reductions in the latter half of 2024, which would be advantageous for both occupiers and investors and should stimulate activity.¹
- 5.3 The Bank of England's Monetary Policy Committee (MPC) held interest rates again at 5.25% in December, unchanged for the third consecutive meeting, following 14 consecutive decisions to increase Bank Rate. Six of the nine MPC members voted to hold rates, with three members preferring to increase Bank Rate to 5.5%. This hold hopefully signals how the coming months will see slight decreases in inflation, stimulating the economy.²

Local Economic Context

- 5.4 Tendring District Council's growth plan outlines the Council's desire to develop and attract new businesses while supporting existing ones. They further aim to promote Tendring's tourism, cultural, and heritage offerings as well as maximise coastal and seafront opportunities.
- 5.5 Section 2 of the Local Plan highlights the need to,
- "create the conditions for economic growth and employment opportunities across a range of economic sectors including established business sectors and those sectors projected to grow in the future such as renewable energy and care and assisted living"³*

¹ CBRE, 2024, *Real estate Market Outlook*, Available at [<https://www.cbre.co.uk/insights/books/uk-real-estate-market-outlook-2024#:~:text=Although%20we%20anticipate%20base%20rates,major%20focal%20point%20in%202024.>], Accessed February 2024.

² Carter Jonas, *Commercial Market Outlook*, Available at [<https://www.carterjonas.co.uk/commercial-market-outlook>], Accessed February 2024.

³ Tendring District Council, 2022, *Tendring District Local Plan 2013-2033 and Beyond*, Available at [https://www.tendringdc.gov.uk/sites/default/files/documents/planning/Planning_Policy/Section_2/Tendring%20District%20Local%20Plan%202013-2033%20and%20Beyond%20-%20Section%202.pdf], Accessed November 2022.

- 5.6 Furthermore, in terms of tourism the Council highlight their aims to; increase the amount of money visitors spend in the District; extend the length of time visitors stay in the District; attract higher-spending visitors, and improve the perception of the District as a tourism destination. To achieve these goals, the council will promote a visitor economy and experience by,
- “developing new and exciting products that will appeal to existing and new visitor markets including marinas, heritage attractions, up-market hotel and self-catering accommodation and interactive visitor facilities, along with improved public spaces, lighting and signage.”⁴*
- 5.7 The Council also details in section 2 of their Local Plan that due to rural spaces being a source of local employment, they will continue to support proposals for agricultural-related development (where permission is required) provided adverse impacts on the environment are kept to a minimum.
- 5.8 St Osyth Priory has recently seen the development of 73 no. homes on its grounds with further developments to ensue. The increase in the local population is likely to see a further increase in demand for both the heritage and event spaces that will be provided through the development of the St Osyth estate.

Property Market Context

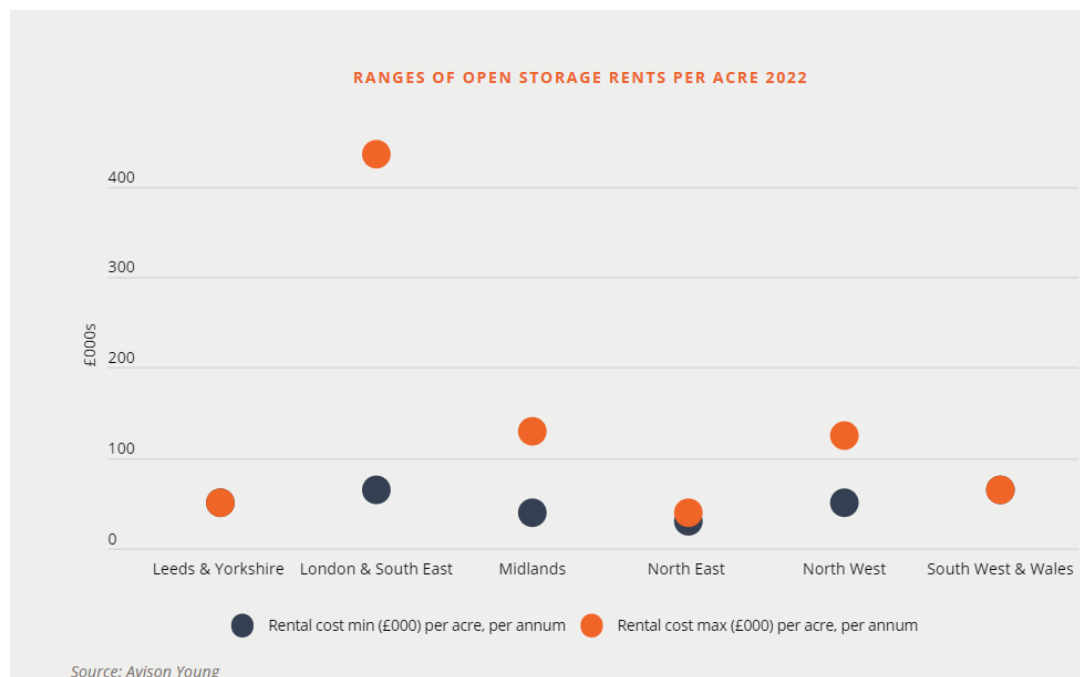
- 5.9 Carter Jonas produces regular commercial market outlooks which detail changes across the sector. The Industrial Occupier strand of the report provides valuable insight;
- *Demand will continue to be strong in 2024, focussed on high-quality class 1 sites, with features such as excellent vehicle access, concrete surfacing, and high security levels.*
 - *With structural undersupply in urban areas and double-digit rental growth over the last two years, investor appetite to enter the open storage sector will remain strong in 2024⁵*
- 5.10 Other market experts are also highlighting the strengths of the open storage land market. For example, Avison Young highlight what investments are likely to attract high rental premiums:
- We believe well-specified sites can secure premium rents above those currently seen in the market. London and the South East command the highest rent and are significantly higher than the other regions. The recent shift in yields on industrial stock will no doubt encourage more land owners and developers to delay development and, in turn, look to secure alternative income from a site.”⁶*
- 5.11 Figure 5.1 displays the ranges of rents for open storage land on a regional basis.

⁴Ibid

⁵ Carter Jonas, 2023, *Outlook 2024, Sector Outlook*, Available at [<https://www.carterjonas.co.uk/research/outlook-2024/sector-outlook>], Accessed January 2024.

⁶ Avison Young, 2022, *Open Storage Land*, Available at [<https://www.avisonyoung.com/experience/marketing-uk/open-storage-land/pricing>], Accessed February 2024.

Figure 5.1 Ranges of Open Storage Rents Per Acre 2022










Source: Avison Young, 2024.


- 5.12 Whilst we acknowledge that the market context outlines a positive outlook for London and the southeast, the data also demonstrates that the quality and amenities of sites are important. Given the condition and limited size of the property, it will not benefit from the surge in demand seen for larger, prime storage spaces.
- 5.13 Below we review the listing data for storage facilities surrounding the subject property.

Commercial Market Research

- 5.14 We have been unable to identify any transactional data for storage facilities in the surrounding areas.
- 5.15 We have reviewed the commercial rental market of storage units within 100 miles of the property to reflect the condition of the subject sites.
- 5.16 We have identified 8 no. sites that are currently marketed for lease as storage units, as would be the use of the properties currently. These are summarised in the data below.

Table 5.1 Summary Of Comparable Evidence

Location	Rent PA	sqft	£ psf	Comment	Image
Saffron Walden	£18,000	3,774	£4.77	Commercial unit on a farm with concrete floor, electric roller door, 4.9m personnel door and CCTV.	
The Oast Workshop, Great Knelle Farm, Whitebread Lane, Beckley, Rye	£22,800	3,071	£7.42	Concrete framed building with corrugated fibre cement panels, and translucent roof panels. It is arranged on 3 floors and has a useful L-shaped yard.	
Marden Road, Staplehurst, Kent, TN12 0PE	£15,000	5,850	£2.56	Comprises a lock-up storage unit of c. 850 sq. ft. with hard-standing area of c. 5,000 sqft. The unit is of steel frame construction with two, sectional up and over doors plus a pedestrian door and a W.C.	
Unit 3 Fences Farm, Fences Lane, Tyringham, Newport Pagnell, Buckinghamshire, MK16	£4,000	672	£5.95	Storage unit close to Milton Keynes. The property has a manual roller shutter door as well as a pedestrian access door. The flooring is part concrete, part wooden.	
Church Road, Ashburnham, Battle, East Sussex	£4,800	8,651	£0.55	Semi-detached unit of steel portal frame construction in two bays, in need of upgrading. The property currently has planning consent for B8 subject to certain conditions. It has a fully enclosed yard with a gated entrance.	
Shelley Farm, Grouse Road, Pease Pottage, Crawley	£6,000	3,000	£2.00	A barn of approximately 3000 sqft in a private, rural, location. Positioned within a 10-minute drive of Crawley.	
Unit 5 Fences Farm, Fences Lane, Tyringham, Newport Pagnell, Buckinghamshire, MK16	£7,950	1,436	£5.54	Storage unit near Milton Keynes. The property has a manual roller shutter door as well as a pedestrian access door. The flooring is part concrete, part wooden.	

Location	Rent PA	sqft	£ psf	Comment	Image
Unit 6 Fences Farm, Fences Lane, Tyringham, Newport Pagnell, Buckinghamshire, MK16	£9,250	3,294	£2.81	Open-fronted storage unit close to Milton Keynes. The property is accessible via its separate road and gate. The unit has concrete flooring, electricity and lighting.	

Source: EGI Property Link & Rightmove, 2024.

- 5.17 The asking prices identified range from £0.55 psf - £7.42 psf. AspinallVerdi note that the properties identified are generally in better condition than the subject. Whilst the majority of units identified are smaller than the site, there is 1no. of a similar size and 1no. unit that is significantly larger than the subject. The units identified are also in established commercial or agricultural settings with the majority having hard surfacing and utilities.
- 5.18 We note from our site visit that areas surrounding the Tithe Barn complex were uneven and access to the site would likely be difficult for large vehicles meaning the site is likely to be less desirable.
- 5.19 The lowest asking price identified is £0.55 psf for the property located at Church Road, Ashburnham, Battle, East Sussex. From the information provided, the unit seems to be in poor condition. The unit does not appear to be watertight, though it is hard-surfaced. It has an area of 8,651 sqft, which is c. 3,000 sqft larger than the subject property. As such we would expect that the subject property would achieve an inflated psf value to reflect the premium associated with smaller spaces.

Alternative Use Value

- 5.20 We acknowledge the aspirations of the Trust to operate the site as a wedding venue. We have researched nearby wedding locations to reveal what potential prices could be. Our report does not assess the demand for such a venue and we assume the Trust have undertaken their own analysis in this regard.
- 5.21 It is reported as follows:
- Copdock Hall is a Grade II listed Elizabethan barn situated in Suffolk. It conducts corporate, private, and wedding events. Hire charges for the venue range from £4,500 for midweek low-season weddings in 2024 to £7,300 for hire on a weekend in the high season in 2025.
 - Smeethan Hall Barn is a 500 year old barn situated in Essex that offers wedding events. The Barn can hold up to 150 guests. Hire charges are £7,599 for a Saturday between April and December 2025.
 - Boreham House is an 18th Century, Georgian, stately home located in the Essex countryside. The premises facilitate function hire for both corporate and private events. For corporate events, the charge is £40 plus VAT per head with venue hire and light refreshments included in this price.
 - Greenwood's hotel and spa is a Grade II Listed 17th Century manor house in Essex. They offer private accommodation as well as corporate and private event hire. The Garden suite which accommodates up to 200 people can be hired for £3,000 from Monday to Thursday in the low season, and for £8,500 on a Saturday in the high season.

5.22 Whilst the venue aims to provide, corporate, community, and wedding events, the latter will generate the most revenue, specifically in the peak seasons.

5.23 Table 5.2 displays the range of costs for wedding venue hire in the surrounding area.

Table 5.1 - Summary of Day Rates for Nearby Venues

	Price per day
Lowest achieved day rate (low—season)	£3,000
Highest achieved day rate (high-season)	£8,500
Average day rate across all seasons	£6,180 approx.

5.24 There is no transactional lease evidence from properties similar to the site. Investigation of sales transactions has shown one property similar to the subject sold by Colliers International.





- Sheene Mill, Station Road, Melbourn, Royston, Hertfordshire SG8 6DX. The property was sold on a Leasehold basis with an expiry date of 7th September 2031. The sale was formalised in January 2023 for £350,000. The passing rent on the property is £96,000 per annum with a rent review occurring in 2026. The property provides the capacity to host a maximum of 180 guests but the Ceremony Pavilion is licensed for civil ceremonies for up to 110 people. Ancillary areas include; a cellar, linen room, and commercial kitchen. There are also 10 en-suite bedrooms. The property has a GIA of 7,126 sqft (£13.47 psf)





5.25 In comparison to the subject site, Sheene Mill has a smaller capacity, with a deficit of 120 covers (assuming that the Tithe Barn complex has 300 covers). It also does not benefit from the historical settings that St Osyth Priory offers. Sheene Mill is not obliged to reserve any time for community events that will not be offered at market rates, unlike the subject site.



5.26 Sheene Mill is an established wedding venue and when marketed in 2022, had deposits of over £150,000 held for over 75 events. This equated to headline sales in excess of £800,000. Advertisement of the property also described considerable interest in events held in 2023. The fact that the venue offers a pre-established business will add a premium to the rental income.

5.27 Due to the lack of transactional evidence of venues, we have also looked at current units for sale to supplement the lease data.

Table 5.2 - Comparable Listings

Location	Asking Price	Capacity	Land (Acres)	Sqft	£ psf	Comment	Photo
Old Palace Chester	£4,750,000	286	1.07	n/a	n/a	The Property has 23no. bedrooms and suites. There are two large function suites, The Ballroom and The River Room, with a maximum capacity of 286 combined.	
Mansfield Road, Arnold, Nottingham, NG5 8PH	POA	150+	5.79	n/a	n/a	Dating back to 1873, Lakeside is a Grade II* Listed former Victorian pumping station which has been recently refurbished. The main trading areas comprise a restaurant (80) with a mezzanine (40), Hawksley's Bar & Lounge (80), a function room (80), and a wedding/function suite (150+).	
The Old Lodge, Old Maltongate, Malton, North Yorkshire, YO17 7EG	£2,150,000	70	3.6	n/a	n/a	The Old Lodge Hotel is a 17th Century Tudor mansion which has been recently extended. The hotel has many original features including high ceilings and oak panelling.	
Cartmel Old Grammar Country House Cartmel, Grange-over-Sands, LA11 7SG	£2,850,000	100	n/a	n/a	n/a	Situated 500m outside of the centre of Cartmel, Cartmel Old Grammar Country House is a Grade II listed building with parts dating back to 1790. The property has 10no. guest bedrooms and function space for 100 people.	

Location	Asking Price	Capacity	Land (Acres)	Sqft	£ psf	Comment	Photo
33 Tonbridge Road Maidstone, ME16 8RX	£1,850,000	n/a	0.75	n/a	n/a	The hotel is a detached property situated 0.4 miles from Maidstone High Street with Meetings and Events facilities as well as an annexe.	
The Chichester Hotel, Old London Road, Rawreth, Essex, SS11 8UE	£1,600,000	200	n/a	n/a	n/a	The property includes further function and bar facilities in beamed farm buildings converted for leisure use. With origins dating back to the 13th Century, when a moated farmhouse stood on the site.	
Sefton Place, Sussex Heritage Centre, Arundel, BN18 9QY	£1,599,999	n/a	n/a	n/a	n/a	The property is located in the rural hamlet of Warningcamp and set in the South Downs National Park, one mile from Arundel Castle. Arundel is located on the A27, with some nearby towns including Brighton, Worthing, Chichester and Portsmouth.	
Yarlington Barn, Wick Road, Lympsham, Somerset, BS24 0HA	£1,150,000	160	12	n/a	n/a	Yarlington Barn is surrounded by approximately 12 acres of woodland, lakes and manicured gardens. The village of Lympsham is located close by, with the City of Bristol 27 miles by car via the M5 motorway. Bristol Airport is also just 40 minutes away	

Location	Asking Price	Capacity	Land (Acres)	Sqft	£ psf	Comment	Photo
Dunsley Hall Hotel, 39 Dunsley Road, Kinver, West Midlands, DY7 6LU	£1,495,000		2.8	10,374	£144.11	Dunsley Hall is a Grade II property dating back to the 13th Century. It is currently trading as an 11-bedroom boutique hotel and also caters for the wedding and events market with a banqueting hall and space for marquees on the extensive grounds.	
The Peppered Pig, Snaith Road Turnbridge, East Cowick, DN14 9BY	£1,000,000	120	0.86	n/a	n/a	The Peppered Pig is marketed as a modern British Inn with a total site size of 0.86 acres. There is a Ceremony licence for multiple areas that are approved for up to 150 guests.	

Source: Christie and Co, February 2024.

- 5.28 We note that the comparable evidence considered mainly comprised units of multiple uses, such as hotels, restaurants and events spaces. In contrast to these units, the proposed development of the Tithe Barn Complex at St Osyth will be only used as an events/ community space. As such there is an increased element of risk associated with the property as there are not multiple uses that will attract several different consumer markets.

Agent Consultation

- 5.29 Agent consultation has revealed that given the St Osyth venue is not yet established, it may be rented on a stepped rental seeing a reduced rate for the first three years that will then increase. We have been advised that the rental increase will be significant across the first 3 years.
- 5.30 The agents consulted stated that although the venue will not have dedicated rooms, this is not always an expectation for potential consumers. Whilst rooms may be a factor that increases value, it is unlikely that not having them will negatively impact value.
- 5.31 We have also been made aware that due to the property's proximity to Colchester, there is likely to be a significant target market to use the venue, making it more attractive to potential customers.
- 5.32 The historical location of the site will have a positive effect on the value due to the setting being picturesque and of historical significance.
- 5.33 We have been advised by agents that an appropriate yield for the property will be between 10.0% and 12.0%.
- 5.34 The market rent for established wedding barns is considered to be £13.50 sqft.

6 Valuations

- 6.1 We set out our opinions of value below.

Valuation Approach and Reasoning

- 6.2 For the valuations, we have considered comparable market sales of similar properties in the area. In addition, we have had regard to lettings of similar premises and applied traditional valuation methodology. Where there is a lack of transactional evidence, we have reviewed current asking prices. However, we acknowledge that asking prices are aspirational in value and do not hold as much weight as transactional evidence. Though listing prices have given valuable insights, the comparable evidence has not offered properties in a similar condition or location; with the subject site being inferior to the market evidence.
- 6.3 We have valued the property (i) as it currently stands, in its current condition (before), and (ii) on completion of the development (after) in order to identify the 'uplift in value'.
- 6.4 The value presented has been made in consideration of the encumbered access to the site as well as the poor condition of the properties.
- 6.5 For (i) the 'before' valuation we have had regard to comparable market sales of storage units within 100 miles of the subject site.
- 6.6 We have adopted a value of £0.75 psf for the Tithe Barn and the Cart Lodge on a storage use basis. The Old Dairy, given that it has an electricity supply and is in better condition is priced at £1.50 psf. This equates to an annual rental income of £2,474 for the Tithe Barn, £807 for the Cart Lodge, and £1,743 for the Old Dairy. (Total £5,024 pa).
- 6.7 We consider a fair yield for the complex to be 9.5% to account for the condition of the properties as well as the access and likely issues with uptake.
- 6.8 From this, a market value of £52,000 has been derived for the buildings (Tithe Barn - £26,000 Old Dairy - £18,000, Cart Lodge - £8,000).
- 6.9 For ii) the value once renovated, we have looked at comparable evidence and made adjustments based on the status of the site as a new start-up wedding venue and as a community venue. From the market analysis, we consider a fair Market Rent for the complex to be £13.50 psf. This equates to an overall rental of £89,513.42 per annum. We have not had sight of the operational income and expenditure business plan by the Sargeant Family who will run the complex as a Wedding/Events business on (we assume) an operational 10-year Full Repairing and Insuring Lease with 5 yearly upward only rent reviews. The EBTIDA from these forecasts should support

this rental level (with sufficient rent for the landlord and profit/return for the operator) for our valuation to be validated.

- 6.10 A fair yield for the property in consideration of its restrictions and limitations is assumed to be 10.0%, based on the complex being completed to the proposed standard.
- 6.11 From this, the value of the Tithe Barn complex (comprising of both floors of the Old Dairy and Tithe Barn) upon completion of works is estimated to be £895,000.

Valuations

- 6.12 We are of the opinion that the Market Value (MV) of the property particularly described within this report was as follows:

Property	Tenure	Value
Tithe Barn Complex at St Osyth Priory, West Field Lane, Essex, CO16 8GW – <i>Before</i> development	Freehold	£52,000 (Fifty-Two thousand Pounds)
Tithe Barn Complex at St Osyth Priory, West Field Lane, Essex, CO16 8GW – <i>After</i> refurbishment	Freehold	£895,000 (Eight Hundred and Ninety-Five Thousand Pounds)

Date of Valuations

- 6.13 The date of the above valuations is 13th February 2024.
- 6.14 We stress the importance of the valuation date as recent experience has shown that property values may change quite significantly over a relatively short period of time.

Material Uncertainty

- 6.15 Our assumptions are based on the site being renovated to allow for the facility to operate as a successful wedding venue without interruption from other works being enacted on-site.
- 6.16 It will take a significant level of cost to achieve the value after renovation.
- 6.17 Given that the second floor of the Old Dairy was inaccessible and beyond use during the time of inspection, it is not included in the 'before' value calculations. It is included in later 'on completion' calculations.

Restrictions on Use

- 6.18 This valuation report is confidential to St Osyth Priory and Parish Trust for the specific purpose to which we refer and no responsibility is accepted to any other party for the whole or any part of its contents. The basis of valuation may not be appropriate for other purposes.
- 6.19 The whole or any part of this valuation report or any reference thereto may only be reproduced, referred to or disclosed with the Valuer's written approval as to the form and context in which it may appear. For the avoidance of doubt, such approval is required whether or not AspinallVerdi are referred to by name and whether or not the contents of our report are combined with others.
- 6.20 Should you have any questions or queries in respect of any aspect of this report, please do not hesitate to contact AspinallVerdi.
- 6.21 For and on behalf of Aspinall Verdi Ltd:

Yours faithfully,

(checked by)



Stephanie Eaton MRICS
Director

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Appendix 1 – Terms of Engagement

Appendix 2 – Standard Assumptions

Proprietary Title

We have not been provided with a report on title and for valuation purposes we have assumed the freehold/leasehold interest is, in all respects, good and marketable. Furthermore, we have assumed the entire freehold interest is not subject to any onerous restrictions, to the payment of any unusual outgoings or to any charges, easements or rights of way of an adverse nature, other than those to which we have referred, if any. We have assumed that there are no outstanding disputes in respect of the property.

Tenant(s)

We have not undertaken investigations into the financial strength of the tenant(s). Unless we have become aware by general knowledge, or we have been specifically advised to the contrary, we have assumed that the tenant(s) is/are financially in a position to meet its/their obligations. We have also assumed that there are no material arrears of rent or breaches of covenants.

However, our valuation reflects the type of tenant(s) actually in occupation or responsible for meeting lease commitments, or likely to be in occupation, and the market's general perception of their creditworthiness.

We have also assumed that wherever rent reviews or lease renewals are pending or impending, with anticipated reversionary increases, all notices have been served validly within the appropriate time limits.

Ground Conditions

We were not instructed to carry out investigations into the ground conditions and our valuations assume that the site is physically capable of development and that no special or unusual costs would be incurred for the provision of foundations and infrastructure, other than those to which we have referred, if any.

No mining, geological or other investigations have been undertaken to certify that the site is free from any defect as to foundations. We have assumed that the load bearing qualities of the site of the property are

sufficient to support the buildings constructed (or to be constructed) thereon.

Contamination

We have been instructed not to make any investigations, in relation to the presence or potential presence of contamination in land or buildings, and to assume that if investigations were made to an appropriate extent then nothing would be discovered sufficient to affect value. We have not carried out any investigation into past uses, either of the property or any adjacent land to establish whether there is any potential for contamination from such uses or sites, and have therefore assumed that none exists.

In practice, purchasers in the property market do not make such an assumption about contamination and a purchaser of the property would be likely to require appropriate investigations to be made so as to assess any risk before completing a transaction.

On the basis of our knowledge this assumption is unrealistic and constitutes a departure from the requirements of the RICS Valuation Standards. The effect of the assumption proving invalid will be to reduce value by an unspecified amount.

Town Planning

We have made only verbal enquiries of the various authorities and the information obtained is assumed to be correct. No formal searches have been instigated. We assume that there are no local authority planning or highway proposals that might involve the use of compulsory purchase powers or otherwise directly affect the property.

Unless our enquiries have revealed the contrary, it has been further assumed that the existing use of the property is duly authorised or established and that no adverse planning condition or restriction applies.

Building Regulations, Certificates etc.

It has been assumed that the building has been constructed in full compliance with building regulations approvals and that where necessary it has the benefit of a current Fire Certificate. We have assumed that the property is not subject to any outstanding statutory notices as to its construction, use or occupation. No allowance has been made for rights, obligations or liabilities arising under the Defective Premises Act 1972.

Minimum Energy Efficiency Standards (MEES)	Unless stated otherwise, we assume that the asset is capable of being let (i.e. EPC rating of A – E).
Local Authority Searches	We would draw your attention to the fact that employees of Local Authority departments now always give information on the basis that it should not be relied upon and that formal searches should be made if more certain information is required. We assume that, if you should need to rely upon the information given about town planning matters, your solicitors would be instructed to instigate such formal searches.
Floor Areas	You have provided us with the floor areas of the property that are relevant to our valuation. As instructed, we have relied on these areas and have not checked them on site (however, parts of the property have been measured where there has been any material doubt). We have assumed that the floor areas supplied to us have been calculated in accordance with the International Property Measurement Standards (IPMS).
Structural Survey	We were not instructed to carry out a structural survey. Our valuations, therefore, have had regard only to the general condition of the premises as evident from our superficial inspection. We have been unable to inspect woodwork or other parts of the structure which are covered, unexposed or inaccessible. We have assumed that no materials have been used in the construction of the building which are deleterious, hazardous or likely to cause structural defects. We have assumed the property is free from any rot, infestation, adverse toxic chemical treatments, and structural or design defects, other than any items set out under the section on condition below.
Deleterious Materials	We have not arranged for investigations to be made to determine whether high alumina cement concrete, calcium chloride additive or any other deleterious material have been used in construction or any alterations, and therefore we cannot confirm that the property is free from risk in this regard. For the purposes of this valuation, it has been assumed that any investigation would not reveal the presence of such materials in any adverse condition.
Plant & Machinery	We include in our valuation only those items of plant and machinery normally considered to be part of the building services installations, which would pass with the property on a sale or letting.

No allowance has been made for any items of plant or machinery not forming part of the service installations of the building. We have specifically excluded all items of plant, machinery and equipment installed wholly or primarily in connection with any of the occupants' businesses (together with their special foundations and supports). We have also excluded furniture and furnishings, fixtures, fittings, vehicles, stock, loose tools and tenants' inventory.

**Mechanical &
Electrical Services**

We have not conducted any test of the mechanical and electrical components and assume all the services to the property are in full working order.

Goodwill

No account has been taken in our valuation of any goodwill that may arise from the present occupation of the property.

**Cost of
realisation/Tax**

We have not made any adjustment to reflect any liability to taxation that may arise on disposal, nor for any costs associated with disposal incurred by the owner or for the existence of any mortgages or similar financial encumbrances over the property.

We assume that stamp duty will be payable at the full rate on any transaction.

Where appropriate, we have made a deduction to reflect an investment purchaser's normal acquisition costs.

**Clawback and
Overage**

No allowance has been made to reflect any liability to repay any government or other grants or lottery funding that may arise on disposal.

VAT

Our valuations are exclusive of VAT.

Appendix 3 – Photographs



Internal photographs of the
Old Dairy





External photographs of the Cart Lodge



Photographs of the surrounding works:



Photographs of the Outside of the Tithe Barn




Appendix 4 – Comparable Market Evidence

**TO LET
STORAGE UNITS**

PEASENHALL
Badingham, IP13 8LT

FENNEL
CHARTERED SURVEYORS
SUFFOLK

6 Market Place
Halesworth
SUFFOLK IP19 8BA
01986 872500
www.fennel.co.uk




LOCATION
Wood Hall Farm is on the eastern side of Peasehall, just 8 miles from the A12 at Yoxford offering easy access to Ipswich, Sizewell and Great Yarmouth.

DESCRIPTION
The farm has a range of buildings to suit various occupiers from small workshops to large storage areas with clear span buildings. There may also be the opportunity to have some outside storage space if that is required. Newly acquired farm which can be adapted to suit the end user.

RENT
The Landlord is seeking rents that vary from £2.50—£3.50psf, available on flexible terms.

ACCOMMODATION
The units have the following approximate areas :

No.7 Farrowing House	34 x 28	1000sqft
No.18 Old Gate House	26 x 33	1240sqft
No.6 Calf Shed	44 x 63	2786sqft
No.15 House Barn		3700sqft
No.10 Tractor Shed	59 x 98	5853sqft




VIEWING Strictly by appointment through this office with:
Jonathan Carman MRICS
01986 872034
07973 235057
jonathan@fennel.co.uk

INVESTMENT
DEVELOPMENT
SALES
LETTING
ANALYSIS
MANAGEMENT

Microsimulation Act 2007: These details are believed to be correct, but cannot be guaranteed, and they are expressly excluded from any contract. Any price, cost or premium quoted is exclusive of VAT unless specifically otherwise stated. Requested by the RICS

See similar properties →



LET AGREED
Colchester [See map](#)

£2,095 pcm £25,140 pa
£4.01 per sq. ft.
Business rates & charges may apply

SIZE AVAILABLE
6,270 sq. ft.
(583 sq. m.)

SECTOR
Storage facility to lease


Lease details

MARKETED BY
Whirledge and Nott, Commercial
The Estate Office, Margaret Road, Great Dunmow, Essex.
More properties from Whirledge and Nott Commercial

Call: 01245 945788

[Request details](#)

See similar properties →



Sibton Green Farm, IP17 2JY [See map](#)

£625 pcm £7,500 pa
£3.00 per sq. ft.
Business rates & charges may apply

SIZE AVAILABLE
2,500-12,454 sq. ft.
(232-1,157 sq. m.)

SECTOR
Storage facility to lease




USE CLASS
B1, B8

Lease details
Lease type: Long term

MARKETED BY
Fennel Chartered Surveyors, Halesworth
6 Market Place, Halesworth, Suffolk IP19 8BA
More properties from Fennel Chartered Surveyors, Halesworth

Call: 01986 800474

[Request details](#)

ONLINE VIEWING

Southwold Road, IP19 [See map](#)

From
£750 pcm £9,000 pa
£3.98 per sq. ft.
Business rates & charges may apply

SIZE AVAILABLE
2,260 sq. ft.
(210 sq. m.)

SECTOR
Light industrial facility to lease

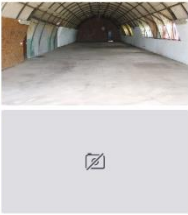

USE CLASS
B1, B2, B8

Lease details
Lease type: Long term

MARKETED BY
Fennel Chartered Surveyors, Halesworth
6 Market Place, Halesworth, Suffolk IP19 8BA
More properties from Fennel Chartered Surveyors, Halesworth

Call: 01986 800474

[Request details](#)



Unit 53A, Nottley Enterprise Park, Raydon Road, Great Wenham [See map](#)

£1,250 pcm £15,000 pa
£5.94 per sq. ft.
Business rates & charges may apply

SIZE AVAILABLE
3,810 sq. ft.
(324 sq. m.)



SECTOR
Light industrial facility to lease

Lease details
Lease type: Long term

See similar properties →

HARVESTED BY
Nicholas Percival Commercial, Colchester
Radnor First Farmhouse
Lynndon Road, Saffron Walden, Essex
Non-competitive from Nicholas Percival Commercial, Colchester

Call: 01202 146392
[Request details](#)



LET AGREED
Bishops Stortford [See map](#)

£1,600 pcm £19,200 pa
£4.87 per sq. ft.
Business rates & charges may apply

SIZE AVAILABLE
3,946 sq. ft.
(367 sq. m.)

SECTOR
Storage facility to lease

Lease details
Lease type: Long term

HARVESTED BY
Whitledge and Nott, Commercial
100 Colchester Office, Margaret Road, Great Dunmow, Essex
Phone group like from Whitledge and Nott, Commercial

Call: 01245 945788
[Request details](#)

Appendix 5 – Valuation Calculations

120224 Tithe Barn complex valuation V0.1 - St Osyth

Tithe Barn Complex Existing Use Valuation

	£ per sqft	sqft	Annual Rent	Value @ 9.5% Yield
The Old Dairy	£1.50	1,162.51	£1,743.77	£18,355.45
The Tithe Barn	£0.75	3,229	£2,421.90	£25,493.68
The Cart Lodge	£0.75	1,076	£807.30	£8,497.89
Total			£4,972.97	

	Yield	Multiplier	Rental Income	Market Value
Tithe Barn complex	9.50%	10.52631579	£4,972.97	£52,347.03

The Cart Lodge existing use value

	£ per sqft	sqft	Annual rent	
The Cart Lodge	£0.75	1,076.40	£807.30	
	Yield	Multiplier	Rental Income	Market Value
The Cart Lodge	9.50%	10.52631579	£807.30	£8,497.89

Tithe Barn Complex Alternative Use Vale (wedding venue)

	£ per sqft	sqft	Annual rent	
Tithe Barn Complex	£13.50	6,630.62	£89,513.42	
	Yield	Multiplier	Rental Income	Market Value
Tithe barn Complex	10.00%	10.00	£89,513.42	£895,134.24

Appendix III: NLHF Round 1 Application

ST OSYTH PRIORY & PARISH TRUST

RECORD OF NLHF ROUND 1 APPLICATION

FEBRUARY 2024

- The application was submitted on February 29th.
- A decision is expected to be made in June 2024, with PTS following by the end of August/ September if successful
- A copy of the application text and supporting documents that were uploaded with the application are below.

SECTION 1. ABOUT THE PROJECT

Name of your organisation.

[This cannot be adjusted]

St Osyth Priory & Parish Trust

Project reference number.

Projects which successfully pass their Expression of Interest and are invited to apply are given a project reference number.

HZ-23-00022

Project title.

Give us a title or name we can refer to your project by.

This will be seen by our decision makers, and if your application is successful, will be used in any public posts made about your project and will be published on our website. Make sure you choose a title that you are happy for a wide range of people to see.

[Text field – 255 characters] [80]

St Osyth Past Preserved: Building A Sustainable Future Through Restoration and Engagement

Is this your organisation's first application to the Heritage Fund?

[Select yes or no]

No

If no: Tell us the reference number of your most recent application.

[Text field – 255 characters] [11]

NL-22-00121

Tell us the project title of your most recent application.

[Text field – 255 characters] [64]

St Osyth Priory: The Development of the Tithe Barn and Old Dairy

Describe what your organisation would like to achieve through your project.

We will use your answer to tell people about your project including our decision makers. Tell us what you hope to achieve and what you hope the legacy of your project will be. We publish details of applications and grant awards on our website and in public databases. This is in line with our commitment to [transparency](#) and [open data principles](#). We will use the information you have provided when answering this question to describe your project.

[Text input – 150 words] [150]

This Heritage Enterprise application will restore the Grade II* Tithe Barn and Grade II Old Dairy, and stabilise the Grade II Cart Lodge, delivering community events and engagement, skills advancement, and enjoyment and conservation of the surrounding natural environment, sustainably underpinned by income from use as an operator-led wedding and event venue.

Currently vacant, deteriorating heritage buildings, will have meaningful use on a site on the Historic England's Heritage at Risk (HAR) Register, with a commercial lease guaranteeing financial sustainability for the Trust, enabling further restoration projects, and crucially providing the space and resources to deliver our charitable purposes through community activities.

Placing the Priory at the heart of the community will be the legacy of the project; understanding and supporting the needs of the people who live in Jaywick (one of the most deprived UK towns) and surrounding areas, adding value to the work of existing groups and organisations.

Tell us what you will do during your project.

Provide a detailed overview of what you will do during your project.

For example, describe any:

- activities that you will be doing
- events that you will be hosting
- items or resources that you will be creating
- heritage items or buildings you will be restoring
- landscapes you will be improving

This helps us to understand what your project is all about.

[Text field – 5,000 characters] [2960]

The St Osyth Priory site, enveloped in over 1000 years of British history, represents a cornerstone of cultural and architectural heritage. Covering a period from Anglo-Saxon times to the present, it signifies a remarkable journey through time, emphasising continuity, endurance, and significance. The St Osyth Priory & Parish Trust aims to preserve and rejuvenate the Grade II* listed Tithe Barn and the Grade II listed Old Dairy, and delivers urgent stabilising works to the adjoining Grade II Cart Lodge - creating an opportunity not only for structural preservation but also for revitalising the community's connection to its history.

The project creates the opportunity for impactful, heritage-led regeneration that delivers economic, environmental and social impacts to Jaywick, Clacton and the wider Tendring area - one of the most economically and socially deprived areas in the country.

This initiative seeks not only to restore these buildings but also to breathe new life into them, transforming them into meaningful and vibrant hubs for community gatherings, cultural events and weddings. The overarching goal is to create a self-sustaining model that ensures the long-term preservation of these heritage sites while promoting community engagement and economic development. A programme of capital works will repair and sympathetically convert the Tithe Barn and Old Dairy into a space for the community and education, that can drive commercial income through hire as a wedding and celebration venue.

However, a critical component of the project for the Trust is its focus on community engagement and skills development. The trust plans to host a series of workshops and educational programs aimed at both adults and children. These initiatives will cover topics ranging from traditional building techniques and conservation practices to local history and environmental stewardship.

The project will develop a range of creative activities inspired by the rich history and natural beauty of St Osyth Priory that tell the story of the site and its significance over

the centuries. The goal is to make heritage accessible and engaging to all, encouraging a deeper appreciation and understanding of the past.

The project creates opportunities and a sense of place through audience-led research into the site's history, improved interpretation, open days, community use of the space including skill and confidence building workshops and creative activity inspired by the history of St Osyth. Through links between traditional and modern-day construction and hospitality, the project creates employment routes through apprenticeships and work experience. Community partners including St Osyth Museum will co-deliver and host activity.

The development will unlock some of the inherent social value and income-generating potential of the site that will lead to long-term financial sustainability and the ability for the Trust to conserve and protect other important historic buildings on the listed Priory precincts.

Where will your project take place?

- Project street [Text field – 255 characters]

St Osyth Priory
The Bury
St Osyth

- Project city [Text field – 255 characters]

Clacton-on-Sea

- Project county [Text field – 255 characters]

Essex

- Project post code [Text field – 100 characters]

CO16 8GW

For landscape projects, please provide an Ordnance Survey grid reference for your landscape.

[Enter reference] N/A

Explain what need and opportunity your project will address.

Tell us about any problems and opportunities there are relating to how:

- your heritage is managed now and its condition
- people engage with the heritage now

Tell us how your project will address the above two problems and opportunities, and how your project fits with any local strategies or wider initiatives. Tell us about any feasibility and options appraisals that have been carried out and why your project is the best and most viable way forward. If your project will improve an area of landscape or townscape, tell us about the current condition of the area.

[Text field – 5,000 characters] [4982]

The entirety of the St Osyth Priory Estate is on the HAR Register and considered in poor condition with 10 heritage assets specifically identified as priorities for Tendring District Council - including the buildings involved in this bid.

The Trust and the freeholders of the Priory Estate, the Sargeant Family, have a joint ambition to deliver a phased approach for repairs to remove the estate from the HAR Register by 2030, with the Trust taking responsibility for the Tithe Barn, Old Dairy, Cart Lodge and Abbot's Tower.

The project will rebuild the community's connection to the Priory that has been lost through 30 years of public closure, with activities targeting local needs including lack of aspiration, mental health and isolation that are exacerbated by poor transport links, few social spaces, and limited employment pathways.

The Tendring area faces many challenges when accessing heritage for people of all ages, including transport links, socio-economic or educational attainment. Tendring area is worse than the median in educational attainment in those aged 16 yrs to 64 yrs and data from the Department for Culture, Media and Sport recognises that people with higher levels of educational attainment are more likely to visit museums and heritage than those with lower levels. Unemployment rates are high which can impact the amount of money families have available to spend on leisure, tourism and heritage. It is important that these barriers to accessing heritage are overcome so the benefits of visiting St. Osyth Priory can be felt by all.

Childhood visits are an essential part in overcoming these barriers, research shows that a person who visited a heritage site or museum as a child is more likely to visit

throughout adulthood. The Education Centre is already providing a strong platform from which we can build; with 1173 primary school children visiting the Priory in 2023.

The project delivers against the ultimate vision of the Trust to restore St Osyth Priory to its original place at the heart of its community as a champion of economic prosperity, education, and wellbeing through delivery of an activity programme that is created and delivered with community partners to deliver positive social impact.

“I ... am seeing first hand when the schools come to visit ... the benefits the children gain outside of the classroom constraints, the excitement on their faces and general wellbeing ... as they get involved with things from history coming alive in a fun way for them.”

The site's Business Plan agreed by Tendring District Council, and on which the associated Section 106 Funding was secured, estimates that successful delivery of the combined 10-year plan of the Trust and the Sargeant Family will result in c£31M-74M of additional spending in the local area over the ten year period, with the local economy gaining an average £49M in associated benefits.

- The project has been developed to align with a number of local strategies, and specifically priorities within the Tendring Economic Strategy 2019-2024 and Tendring District Council Corporate Plan 2020-2024, including:
- Diversification of the local business base: there are few historic houses and/or exclusive-use wedding venues in the local area.
- Creation of more employment opportunities - both during and beyond the project.
- Valuing Tendring as a place where people want to live and work, leading to pride in place.
- Promoting partnership at a local and regional level: building relationships between community groups and the Trust.
- Development of skills and aspirations in residents: inspired by the monastic history to build confidence and wellbeing. Partnerships are being developed with community organisations including Clacton Guides, Extra Support for Families, and the Ambitious Women in Essex Network.
- Promotion of Tendring's tourism, cultural and heritage offers: as outlined in the Tendring Heritage Strategy, much of the area's heritage tourist attractions are focused in Harwich and Walton-on-the-Naze. This project will build on the work of Heritage Lottery Funded project 'Resorting to the Coast', that celebrates and

shares the seaside heritage of Tendring, particularly Clacton-on-Sea and Jaywick Sands, along with the Jaywick Martello Tower, to create an attractive hub of heritage assets in the local area.

Options appraisals by Savills and Colliers have shown that conversion to a wedding and celebration venue run by a commercial operator will provide the Trust with a sustainable annual income to deliver against their charitable purposes, delivering educational and wider community benefit. This model allows access at a level equal to anticipated public demand without the burden being responsible for day-to-day management of the buildings. Income from the commercial operator will provide seed funding for other projects the Trust wishes to deliver in addition to its educational activities, providing longer-term financial sustainability for the Trust.

Why does your project need to happen now?

Tell us:

- if the risk to your heritage is critical
- about any partnership funding that is available to you now that won't be in the future
- what will happen if you do not get a grant from us

[Text field – 5,000 characters] [3489]

Delays in securing funding to deliver the project has led to additional deterioration of the buildings involved, particularly in the Tithe Barn where recent Condition Surveys show advanced decay and failures to some structural elements; this has led to further cracking of tie beams, and the roof to sink at one end. Temporary supports have been introduced to prevent further movement, but urgent repairs are required to retain as much of the original fabric as possible. Similarly, the roof of the Old Dairy is beginning to decay, with further rot evident in the timber of the doors and windows.

The Cart Lodge shows a number of concerning cracks and breaks that require urgent stabilisation - however, due to funding limits and our own affordability and being realistic about the amount of match we will be able to raise, full restoration of this building is paused until a second phase of works - that will either be delivered as a discrete and separately package of works, or as part of the restoration of the Abbot's Tower.

There is a risk that if the project is delayed that further deterioration combined with increased building costs will mean that not only the repair and restoration of these buildings becomes unviable as the Conservation Deficit increases, but it will also impact on the Trust's ambition to work with the Sargeant Family to remove the whole Priory estate from the Heritage at Risk Register by 2030.

Beyond the physicality of the buildings, the project will address real needs present in the community. Tendring is an area which was already experiencing a very high level of multiple deprivation prior to the impact of Covid and the cost of living crisis. The community is fractured and suffering, as a result of lower than average skills and employment, generational divides, and high levels of mental health issues. The Trust believes the partnerships it is developing with local community groups, in addition to the opportunity presented by building authentic community engagement throughout the project, can deliver real positive impact for the people of Tendring. Through agreement with our capital works partner once openly and competitively procured at the beginning of the Delivery Stage, the project will be designed to offer work experience and apprenticeship opportunities for the repair and restoration of the Tithe Barn and Old Dairy and the stabilisation works to the Cart Lodge, with successful apprentices likely to secure long-term employment as a result.

Research within the Tendring Heritage Strategy states “over 90% of people living in areas where significant heritage-led regeneration has taken place agreed that investment in the historic environment has resulted in a nicer place in which to live, work and socialise”. There is clear evidence that improving access, and developing activities in response to community needs through co-creation, will not only protect the outstanding heritage of the site for future generations, but support the positive transformation of our community.

Additionally, with our Section 106 funding in place on a time limited basis by the nature of the agreement, we want to ensure that this funding opportunity is used for its intended purpose. We would like to complete the capital works project that will allow us to generate our own income to support the other works on our masterplan, including the restoration of Abbot's Tower and the full restoration of the Cart Lodge, as well as the ongoing work of our education and community programming.

Who else have you approached about funding your project?

At this grant level you must contribute towards the costs of your project, depending on the amount of grant you are applying for.

Tell us about any funding:

- you have secured to help towards the cost of your project
- you are planning to apply for to support this project
- you will raise through fundraising or crowdsourcing

If you are providing the minimum required, or you are unable to provide any partnership funding, please explain why.

The trust secured £1.2M through Section 106 obligations plus £300,000 of Gift Aid.

Approximately £320,000 has been spent in setting up and running the Education Centre along with professional costs in making grant bids over the years. The Trust has bid successfully for and managed grants in the past from the Cultural Recovery Fund (CRF) in an amount of £75,400, two grants from the Wind Farm Trust for c.£20,000, as well as smaller grants from organisations such as St Osyth Parish Church and the Make a Difference Locally charity foundation.

Historic England have in the past given a grant to the Estate and are very supportive of the Trustees and the work that the Trust is doing. Based on conversations, the expectation is that further grants will be forthcoming from Historic England once the Trust has made a successful bid for NLHF funding, as it will start to build funder confidence. The Sargeant Family has also indicated that they will make further donations.

The Trust is also currently advertising for a FTE Grants and Administration Officer (the Job Description for which is included in this application) to provide dedicated resource to deliver against our matchfunding strategy, which includes trusts and foundations, government funding, HNWIs, gift aid and individual giving.

The Estate Business Plan, agreed by the Council, recognises that there is a need for further enabling development, which could be a further avenue of funding in the future if the Trust can demonstrate that it has been successful in winning and efficiently deploying grant monies.

Tell us if you have raised any non-cash contributions to help you deliver your project.

[Text field – 5,000 characters] [2428]

We have not secured any materials or donations in kind for our project at the time of this application, but we are able to dedicate a significant proportion of volunteer time towards the project.

Volunteers provide a supporting role to the staff and Trustees of St. Osyth Priory & Parish Trust and Education Centre. Volunteers are given training in order to complete this role and are consulted at all stages about what is expected of them while volunteering.

The current team of 74 volunteers dedicated 868 hours in 2023 to supporting the delivery of work from our Education Centre. We would expect an uplift in these hours during the course of the Past Preserved project, and have calculated this based on the Activity Action Grids - which includes 1500 Skilled Volunteer Hours in development and 3000 in delivery, as well as contributions from Trustees as Professional Volunteers. In addition to increasing volunteer hours contributed, we anticipate increasing the volunteer workforce by a minimum of 10 new volunteers.

Volunteers will undertake tasks such as interpretation research, supporting delivery of the activity plan and pilot events and the co-creation of learning opportunities with schools, development and piloting of themed school sessions.

We have engaged with the volunteers as part of the consultation process, and have received positive feedback as well as early interest from volunteers in terms of recording and collating oral histories and interpreting the history of the site to support the role of the Historian in Residence.

In preparation for the Delivery Phase, during Development, new and existing volunteers will be offered training appropriate to their role including:

- Heritage learning and education delivery
- Heritage research
- Leading guided tours and delivering talks
- Disability awareness
- Dementia awareness
- Autism awareness

The current volunteer force represents a relatively even split between male and females, with a variety of age groups comprising the demographic makeup of the team, encouragingly including 9 individuals aged under 18 and volunteers with disabilities, providing a picture of volunteer tasks that do not face barriers due to age or ability.

Volunteers will undertake regular evaluation so their learning and skills development can be recorded, as well as monitoring of hours worked, and demographic information to record any changes in diversity of the volunteer pool.

Tell us what advice you have received in planning your project and from whom.

If you have spoken to anyone from The National Lottery Heritage Fund about your project, tell us about the advice you received and how you have used that advice to develop your project.

Tell us if you have received any specialist advice about your project from anyone else. This could be experts in the heritage your project focuses on or other organisations who will support you to deliver your project.

This could include:

- any consultation you have done with your local community and those who will be involved in your project
- any project proposal advice, such as from an architect or conservator
- any pre-application advice on planning and/or listed building consent matters, such as from your local authority or an archaeologist
- advice about how to address wellbeing for your project participants, such as from a charity or local group who can provide support which is relevant to their lived experience

[Text field – 5,000 characters] [4999]

We received feedback from Robyn Llewellyn, Director of England, Midlands & East, following our 2018 application that the Trust should seek to develop their track record in project delivery. Following this, we hosted Dawn Bainbridge and Rachel MacFarlane on site in 2019, who provided us with some advice on how we could develop our educational and heritage offering on the St Osyth Priory site.

In response, the Education Centre was established in 2021 with the support of CRF funding, and we have established a track record of successfully managed grants from The Essex Community Foundation as well as the CRF grant.

We took advice from Rachel MacFarlane, Senior Engagement Officer, in the lead up to and following our previous application for this project in 2022. We valued this feedback and put in place the recommendations discussed, including removal of perceived conflicts of interest, and clear governance structure and policies - details of which are included in the full governance pack appended to this application.

We have 2014 planning consents that support the project from Tendring District Council for changes in use for conference/ function and wedding use to the Tithe Barn, Old Dairy and Cart Lodge including internal and external alterations and ancillary works.

We have been in contact with Historic England, as a previous funder on the Priory site, who are supportive of the project as it will mean the ultimate removal of the site from the Heritage at Risk Register.

Due to surrounding high deprivation, general opening and ticketed income will not be sufficient to support conservation. Financial sustainability is integral to plans so the Trust can protect the HAR registered site whilst maintaining and enhancing public access. We will therefore deliver a mixed model of educational and free community access to the buildings, while also delivering additional income from paid for and community event income - as well as the commercial operator lease income.

Consultation with individuals, community groups, and schools shows the need for space for creative and heritage activities and for people to come together, which has informed our activity plan. Extra Support for Families and Clacton Guides have already indicated in our discussions with them that they are keen to pilot activities in the Barn and parkland with a view to regularly utilising the space.

We have a strong connection with St. Osyth Museum, working together to share resources, research and to lead visits. A Museum in the village is a real asset to the community and we will work closely with them to ensure their success and continue to share their resources and expertise. The new spaces in the Tithe Barn complex will further unlock opportunities for related events and activities.

With St. Osyth Church of England Primary School we provide activities and respite for pupils who have a caring role for family members. This is for 9 two-hour sessions throughout the school year. This can be completing practical tasks, like cooking, housework and shopping, physical care, such as helping someone out of bed, emotional support, personal care, and looking after siblings. The opportunities to financially support and extend this work into the new spaces will be expanded hugely through the Past Preserved project.

Working with Essex Book Festival and Arts Council England, we are planning an exhibition focused on a range of artistic and cultural expressions of the community's memories of St. Osyth Priory. It is planned that this project will include many other creative community groups e.g. Jaywick Creative Writing Group and Historical Societies in the area, and the larger spaces enabled through the project will allow the opportunity for this event to grow.

We work with Home-start Colchester-Jaywick-Clacton and hosted their family Christmas event in December 2023. We will explore further ways in which we can work together and are looking at possibilities for further events for families they work with as well as events to support their volunteer team. The larger space available in the Tithe Barn unlocked through this project will be perfectly suited to enabling this.

Doucecroft School is a specialist co-educational school for children and young people with autism and additional complex needs, aged 3 –19 years. We have met with staff from the school on site to discuss how we can create an experience at the Priory to meet the complex needs of their students, an opportunity that can continue to grow as they embark on a project of public engagement in History, Heritage, Nature and Art. The Tithe Barn spaces will naturally lend themselves as a home for this public programming.

Will your project be delivered by a partnership? Y/N

Tell us who your partners are, the nature of your partnerships and how you will work together. If you are working with any other organisations to carry out your project, we would like to see your partnership agreement. This document should outline all partner's roles and

responsibilities and should be signed by all parties. This agreement should reflect the needs of your project and you may need to seek independent advice.

You do not need to provide a partnership agreement unless any other organisations are delivering a significant part of your project.

Tick if yes. **NO**

[Tick box]

Who are your partners? Please provide a named contact from each organisation.

[Text field – 5,000 characters] **N/A**

SECTION 2. ABOUT THE HERITAGE

Tell us about the heritage in your project and why it is important to your organisation and community.

Provide a description of the heritage as it is today. If different types of heritage are involved, describe each of these.

Provide factual information about the heritage. For example:

- If your project is about heritage that is not physical (such as memories or cultural traditions), tell us about the subject and time period, if relevant.
- If your project is about physical heritage (such as a building, ship, historic object, collection or nature reserve), give us factual information about it, such as its size, when it dates from, the surviving features, its condition and why it is important to your local area.

Tell us:

- if there is any official recognition of this heritage, for example, it may be a listed building (if so, tell us its grade) or a Site of Special Scientific Interest
- what is important about the heritage, for example it may be a source of artistic, architecture or scientific interest
- who the heritage is important to, such as experts and/or the local community
- why the heritage is distinct or unique
- how the heritage relates to other heritage, for example in the local area or nationally

[Text field – 5,000 characters] **[4826]**

“The Priory has played such an important part of British History for over 1000 years and for me as a ‘local’ I feel this is so important to continue to make this a living and working space once again.”

Heritage can be a defining feature in many peoples' lives and being able to access heritage provides roots and cultural identity for a community. Heritage sites are highly valued by their communities and St. Osyth Priory is no exception, with the community having a deep sense of ownership and connection with the site.

St. Osyth Priory had been shut to the public for decades prior to the opening of the Education Centre. Many people who have moved to the village or have grown up in the area during that time have no idea what is behind the boundary walls. The Education Centre is now providing opportunities for people of all ages to visit the Estate and develop a pride in where they live through having such an important historical feature in their area.

The ongoing history of the Priory from Anglo-Saxon times to the present, a span of 1300 years, conveys to the local community continuity of being, endurance and greatness. The 200 acres of Parkland provides the green spaces for the community which are an essential part of wellbeing and creating an environment which is an attractive place to live. By the Education Centre opening access to St. Osyth Priory we are creating opportunities for employment, volunteering and economic benefits to the village through the attraction of visitors and tourists to the area.

The project delivers against the ultimate vision of the Trust 'to restore St Osyth Priory to its original place at the heart of its community as a champion of economic prosperity, education, and wellbeing' by acting as a foundational step in the removal of the Priory from the Heritage at Risk Register, and through delivery of an activity programme, that is created and delivered with community partners, to deliver positive social impact.

"The visit was one of the events we organised to mark Loneliness Week and the group consisted of carers and other people who suffer from loneliness and social isolation. They all thoroughly enjoyed the afternoon and especially enjoyed making herbal remedies."

There is particular interest in the history and martyrdom of St Osyth, providing opportunities to connect local stories and heritage with the broader history through the ages. Consultation shows the importance to our current audience of local, older adults is not just heritage, but also evokes memories of childhood visits to a special place that before closure welcomed over 20,000 visitors annually. By restoring public access, the Priory's connection with the community will be rebuilt allowing visitors to create new memories with their own children and grandchildren.

The Grade II* Tithe Barn, and Grade II listed Old Dairy and Cart Lodge sit within the exceptional grounds of St Osyth Priory - in itself a Scheduled Ancient Monument, Registered Garden and Parkland, and the heart of the St Osyth Conservation Area.

The St Osyth estate is specifically referenced in two local plans; the 2019 Tendring Heritage Strategy (THS) and 2021 St Osyth Conservation Area Character Appraisal and Management Plan (CAAMP) and the project has been developed in line with the themes and priorities within, and in consultation with both Tendring District Council and St Osyth Parish Council, who are invited to join the board of Trustees.

The current THS identifies key themes that will ensure its heritage is protected, sustainable, and continues to develop as a resource; namely conservation, collaboration, knowledge, interpretation, accessibility, character and identity. This project aims to deliver conservation works through the repair and conversion of the Tithe Barn and Old Dairy and stabilising works to the Cart Lodge with a supporting activity plan responding to the remaining themes.

The project also aligns with the priorities of the THS; restoring three currently vacant heritage buildings back into meaningful use, creating an opportunity to retell the stories and histories of and for local communities, rebuild pride in place, create jobs and provide a vehicle and venue for community groups delivering third sector support for wellbeing, social prescribing and skills-building in an area with multiple social and economic needs.

The THS includes research from Heritage Counts (2018) stating that 'Heritage anchors people to their roots, builds self-esteem, and restores dignity...in other words, the past can become a foundation for the future' and also highlights that cultural heritage for inclusive growth should be locally led; this has informed our community-focused approach to the development of our activities, to ensure that we are constantly growing and responding to local needs in the most effective way possible.

Is the heritage considered to be at risk?

Tick if yes.

[Tick box]

YES

Explain why and how you consider the heritage to be at risk.

Explain why the heritage is under threat, and what actions have been taken (if any) to minimise the risk.

For example, it could be at risk of loss through physical damage or neglect, or financial shortfalls. In the case of oral and community histories, it could be at risk of loss through people passing on. Public access to the heritage may also be at risk of loss.

If your project involves a building or a monument, tell us if it is on a buildings or monuments at Risk Register, for example Historic England's Heritage at Risk Register.

If your project involves several buildings in a conservation area, tell us if the conservation area is on an at Risk Register.

If your project involves natural heritage, tell us if the landscape, geology, habitat or species is at risk and in what way (for example, identified in a Biodiversity Action Plan as a priority).

Tell us:

- the current condition of the heritage
- how it is currently managed and by who
- how people currently engage with the heritage

[Text field – 5,000 characters] [3153]

The Grade II* Tithe Barn is first documented on an inventory drawn up at the time of the Dissolution as 'The Great Barn' and from structural evidence dates to the second half of the 16th Century. It is of special interest for the quality and intactness of its timber construction, retaining details of techniques specific to the period, as well as the unusual combination of stone and timber.

The Old Dairy is a two storey building of late 18th Century date, having undergone considerable repair and alteration in the early 19th Century. In its listing description it is referred to as stables, and was used most recently as a dairy, apparently providing dairy products for the Convalescent Home. Its original use was as stabling for five horses, with a hay loft above; it was apparently in use as a cowhouse, with feed chutes from the hayloft and brick and tile floors, when the Listing was carried out in 1950.

The Grade II Cart Lodge is a six-bay oak-framed structure of 18th Century date, open at the ends and on the east side against the Old Dairy and the west end of the Tithe Barn. It has retained much of its 18th Century frame, and has historic interest as part of the evolved Priory complex, particularly as it may have been translocated from elsewhere on the estate in the mid 19th Century.

The buildings are currently unused on a day to day basis and not accessed by the public, but have some usage as storage. Restoring these buildings will therefore convert heritage assets that have not been used within living memory.

The Priory site as a whole is on the Heritage at Risk Register, and the Tithe Barn, Old Dairy and Cart Lodge are currently in a deteriorating condition that threatens further damage that will impact their significance. This risk can be mitigated through respite and restoration, but without a return to viable use and a sustainable source of income,

it is likely that the buildings will once again decline into a state of disrepair, with vacant buildings deteriorating far more rapidly than buildings in use.

While current funding ceilings and affordability mean we cannot deliver an entire restoration of the Cart Lodge, we will be undertaking stabilisation works to prevent further deterioration and reduce any associated risk and ensure that the aesthetic doesn't detract from the overall enjoyment of the venue. We are committed to delivering this building in its entirety as part of our broader remit; if we are unable to find funding for this as an associated discrete package of works, we will include in our next phase of capital restorations that will include the Abbot's Tower.

This will harm not only the significance of the buildings themselves, but also the quality and character of the wider Priory Estate. The Tithe Barn and Old Dairy lend themselves towards restoration and conversion that will remove their 'At Risk' status, and in time, support the repair of other buildings (including the Cart Lodge) within the estate that means it can be removed entirely from the HAR Register.

Recent surveys show significantly advanced decay in all woodwork, plasterwork, and roof tiling; particularly in the Tithe Barn, where a failed corner post has caused a sunken roof and cracked tie beam. Repair is needed to protect from further deterioration and loss of the historic fabric.

Has a condition survey been undertaken for the heritage asset in the last five years?

Tick if yes.

YES

If your project involves the conservation of heritage, you must provide a condition survey or another appropriate document (for example, a draft or outline conservation plan). This document should tell us the current condition of the heritage and the works that are needed to return the heritage to a good condition.

For example, if you plan to conserve a local place of worship, you will need to know the current condition and what repair works are needed. The survey or report should also indicate the relative priority of the proposed works so you know which are the most critical and need to be tackled most urgently.

There are other types of survey which could take place, including a building performance and energy efficiency survey, or a site survey which assesses the services and use of the site. An archive might also need a condition survey or audit, which is usually done by an archivist.

If you have had any kind of condition survey done, you can upload it later in the application.

[Tick box]

YES - CARDEN AND GODFREY 2022

Will you be undertaking any capital work as part of your project?

Tick if yes.

[Tick box]

YES

If yes: please provide details.

Capital works are defined as works that create or improve an asset. These can include physical works to landscapes, nature and buildings, repair, conservation, new build, digitisation, or work to stabilise the condition of objects.

Examples of capital work:

- conservation of a heathland
- repairs to a historic building
- digitisation of a photographic archive

Tell us if any capital works will be part of your project, even if this is a small part of your overall project. Give us an initial breakdown of the work you intend to carry out.

[Text field – 5,000 characters] [3389]

We will be undertaking a programme of capital works to repair and sympathetically convert the Tithe Barn and Old Dairy, creating spaces for educational and community engagement, and allowing us to lease the space to an operator at a commercial rate for use as a wedding and celebration venue. The development will unlock some of the inherent social value and income-generating potential of the site that will lead to long term financial sustainability, and the ability for the Trust to conserve and protect other important historic buildings on the listed Priory precincts.

As part of the works, we will also review car parking facilities and capacities, although these are already being improved through Sargeant family-led projects ongoing across the wider estate, as well as improving the landscaping to the exterior of the Tithe Barn, Old Dairy and Cart Lodge.

We will undertake important stabilising and enabling works during the development phase. For the Tithe Barn, enabling works include constructing propping for structural support, removing ivy, and addressing various areas of decay and instability. These

efforts will stabilise the building, prevent further damage, and ensure safety ahead of permanent restoration.

The Old Dairy focuses on securing and stabilising deteriorating structures, particularly on the first floor and ground lobby. Measures include cordoning off unsafe areas, propping weakened structures, removing hazardous materials, and addressing external wall vulnerabilities.

During the delivery phase, for the Tithe Barn, the schedule includes replacing decayed timber elements, repairing roof structures, and salvaging and reusing roof tiles. Structural reinforcements, weatherboard repairs, and window and door refurbishments are also planned, alongside insulation and underfloor heating installation for a new floor layout. When complete, the Ground floor could seat between 176-220 people, and has space for a bar, bar store and toilets, including disabled WCs. The Mezzanine floor then provides space for a conference or smaller dining space, or additional seating for events held on the ground floor.

The Old Dairy focuses on roof repairs with insulation enhancements, wall repairs, window and door refurbishments, and structural repairs to the first floor. It includes significant updates to accommodate a new commercial kitchen, with attention to maintaining and enhancing the building's thermal performance and aesthetic integrity. The First Floor will provide space for toilets, offices and a multipurpose/ storage area.

For the Cart Lodge, the schedule outlines propping both ends to support decayed bases and main frame posts, clearing ivy, and addressing structural weaknesses caused by dampness and decay. The work is aimed at stabilising the building and preparing it for further restoration and repurposing efforts in the future once additional funding is secured and the scheme is more affordable for the Trust.

If you are undertaking any capital work (including repair or refurbishment) to land, buildings or heritage items, tell us who owns it.

- your organisation
- project partner
- neither
- N/A

Please provide details about your capital works owner.

If capital works are part of your project, you will need to tell us who owns the heritage. If you have them, we need to see any ownership documents. You can upload these later on in the application.

If your organisation owns the heritage, tell us:

- if your organisation has the freehold of the building or land, or own outright the heritage items
- if your organisation has the lease of the building or land and how many years are left to run on the lease
- If your organisation has, or is planning to take out, a mortgage or other loans secured on the building or land, or heritage item. If so, give us details of the lender and the amount of the mortgage or loan.

If a partner organisation owns the heritage, tell us:

- the name of the partner organisation
- if the project partner has the freehold of the building or land, or own outright the heritage items
- if the project partner has the lease of the building or land and how many years are left to run on the lease
- if the project partner has, or is planning to take out, a mortgage or other loans secured on the building or land, or heritage item
- if so, give us details of the lender and the amount of the mortgage or loan

If you do not currently meet our ownership requirements, tell us the date when you expect to do so. If you have any ownership documents, you can upload them later in the application.

[Text field – 5,000 characters]

The freehold to the buildings referred to in this bid is owned by the Sargeant family. The family will grant a 90 year lease to St Osyth Priory & Parish Trust in order achieve the objectives set out within this bid document and its attachments. An outline of the proposed terms of the lease and our approach to developing it within the Development Phase are included within the supporting documents.

Are there any legal conditions, restrictions or covenants associated with the heritage asset which may affect your project?

[Tick box] Yes/**No**

Please provide details.

Tell us if the register of title or other ownership documents contain any restrictions or limitation on its use or ownership, or if it requires any consents for any dealings. If so, you will need to give us the full details and evidence that these are satisfied.

This could include:

- a Restrictive Covenant limiting the type of use for the land or property
- a restriction giving another party a right to be notified of any dealing or state conditions that would need to be resolved before the property is sold

[Text field – 5,000 characters]

N/A

Does your project involve the acquisition of a building, land or heritage items?

Select one of:

- yes
- no
- N/A

SECTION 3. MANAGING YOUR PROJECT

Has your organisation taken on a project of this scale in the last five years?

[Tick if yes] Yes/No

If yes: please provide details.

[Text field – 5,000 characters] [XXX]

N/A

Tell us why this is the most appropriate project for your organisation to take on at this time.
What other strategies have been considered? What will you do if the project does not go ahead?

[Text field – 5,000 characters] [3634]

Located in Tendring and neighbouring Jaywick - one of the most deprived towns in the UK - the timing of this project is vitally important. Particularly post pandemic, the need for a venue that can provide wellbeing facilities and community support, delivering a positive social impact within our locality has never been greater.

While being relatively new as an organisation, the Trust has gained experience in developing and managing NLHF projects following their successful application to the Culture Recovery Fund for the creation of an Education Centre at the site. We have sought support from Tricolor Ltd to review our governance, develop an accompanying fundraising plan, project plan and this application. As part of this process, we have also looked at how to strategically build our capacity to deliver this project.

Explored in the 2017 Savills Options Appraisal report, and based on our recent research and consultation (a report from which is appended to this application as a supporting document) and the experience of Black Jacket as an incumbent operator on the site, we are confident that there is sufficient demand for both additional facilities for weddings and events to drive commercial income, as well as the increased capacity and facilities for our educational and community programming. This usage of the heritage buildings would generate an income to allow us to be financially sustainable and resilient, and create the most meaningful impact for the communities we want to support.

The Trust's Business Plan is based on the restoration being delivered in two phases, with the first focusing on the heritage assets that are required for effective delivery of the business operations across the estate. For the Trust, this is the return to use of the Tithe Barn and Old Dairy. The second phase will address the remaining assets that are of equal heritage value but will not generate significant income, such as completion of the Cart Lodge, and the Abbot's Tower. The Trust must successfully deliver the first phase to create a sustainable income to deliver the second, in addition to a seed fund for any ongoing or unexpected repairs.

Having considered all options we are satisfied that this is the most appropriate use for the buildings and the most effective approach to deliver the long term aims of the Trust: removal of the estate from the HAR Register, and restoration of public access to the site.

Please note that the Options Process ONLY focused on the COMMERCIAL usage of the buildings, with both the Section 106 legal conditions and the articles of the Trust requiring that the buildings also provide access to the community. This has therefore been built into a mixed income model in our business plan, with the commercial option identified driving the income that enables the Trust's work with the community and building of reserves to undertake future restoration projects.

Should this application not be successful, we would focus on fundraising to deliver a much reduced project that delivered small scale repairs only; this is not the preferred option as the building would remain vacant as opposed to returning to a viable economic use, meaning the Trust would not gain any income from these buildings and would greatly reduce our activities, engagement and outreach that deliver social benefit and public access. Small scale repairs would help mitigate the further deterioration of the buildings for a short period of time, but long periods of delayed further funding would negatively impact on the condition of the buildings, and will continue to do so.

Does your organisation need to undertake any capacity building activity to better deliver your project?

For example, do you need to review your financial or HR system, develop your business plan or build fundraising capacity? Do you need to bring in any extra skills or expertise? Tell us whether you will be making changes to the governance of your organisation to enable you to deliver your project more effectively. You can include the costs of professional support for a governance review in your project costs.

[Text field – 5,000 characters] [2803]

As a decade-old organisation, we currently have a lean, Trustee-led staffing structure, and recognise that we need to bring in extra capacity to deliver this project; both through the recruitment of staff roles to support the Trust, as well as the procurement of external specialist contractors to deliver the programme of works.

As part of our previous Lessons Learned (included with this application), we took the guidance and feedback from our unsuccessful 2022 Round 1 bid very seriously. Including carefully reviewing and removing any perceived conflicts of interest through our Conflict Register and restriction of voting rights where relevant, we have also since undertaken a governance review, and put in place detailed new policies related to our governance, all of which have been appended to our application. We have also undertaken in January this year a Trustee Skills Audit and are very clear where we need to continue to invest and develop - specifically in areas related to: Governance training; Fundraising training; Digital skills training; EDI training and Community Engagement.

We will be focusing on turning this into a timed, costed action plan and have allowed within our requested development phase grant an amount for professional fees to support this governance and organisational development within Business Planning support; which may also involve reviewing our proposed growing and changing organisational structure as part of a

change management plan. This takes into account the longer term view with the goal of delivering the project and robustly achieving the Trust's strategic objectives. We are clear that training should not only address current gaps but also keep the Board informed about evolving best practices, ensuring they confidently fulfil their statutory duties while remaining proactive in adapting to emerging standards in charity governance.

We will also appoint specialist commercial property lawyers to deal with any related contractual issues that may arise, related to the leasehold of the buildings. Our proposed and detailed methodology for approaching this is included in our supporting documents and we have allowed for this within our project budget and funding ask.

In recognition of the importance of closing the funding gap for this application as well as exploring future grant income for the trust, we are also currently in the process of appointing a Grants and Administration Officer to support our match funding efforts, as well as ensuring the smooth day-to-day running of the Trust. Once appointed, this team member would also support the Project Manager with reporting to the NLHF, if this application is successful as hoped.

The Trusts own focused business plan that sits outside the site wide plan, and included with this application, will be developed during the development phase with the support of the business planning consultant.

Tell us about any jobs or apprenticeships that you will create to deliver your project.

Provide an estimate of any jobs and/or apprenticeships that will be created and will be directly involved in delivering your project. Tell us what their main roles will be and whether they are full-time or part-time positions.

If you are moving an existing member of staff into a post created by this project or extending the hours of an existing member of staff, tell us how they are qualified for the role created by the project. Describe how you will choose the staff.

You will need to provide a job description for each role created for the development phase of your project as a supporting document to your application.

[Text field – 5,000 characters] [2360]

We would like to recruit an FTE Project Coordinator to support the project. This role holder

would be responsible for representing the interests of the Trust throughout the project, coordinating sign-off and communications with the Trustees, liaising with the Project Manager, Multi Disciplinary Design Team (MDDT) and Quantity Surveyor (QS), supporting the Round 2 Application Process and supporting the management of the programme of capital works through the development and delivery phases.

With the help of this NLHF Grant, we will also appoint a part time (21 hours per week) Community Engagement Officer - working closely with the Education Manager, this role will support the St Osyth Priory & Parish Trust education and engagement ambitions. The successful candidate will provide day to day support to the Education Manager and assist in planning, supporting and delivering activities from the action plan - most importantly developing relationships and partnerships within local communities. We hope that the post will be successful and will continue through the delivery phase, and become a permanent position.

The Trust also intends to appoint a Historian in Residence to research one of a number of themes identified as priority, based on general public surveys about the areas of highest interest. In addition to providing written reports that can supplement existing research about the Priory and St Osyth, the successful Historian will also work with both SOPPT volunteers and St Osyth Museum to develop their research skills, meaning that high-quality research can continue beyond the lifetime of the project.

We will deliver a minimum of two Level 1 Construction Trade Apprenticeships in a potential collaboration with Tendring Education Centre - delivered and funded as part of our contract with the capital works owner.

We will create work experience placements in association with Clacton Coastal Academy or Tendring Education Centre to provide paid-for work experience opportunities for young people aged 16-25 in a variety of areas such as marketing, heritage learning, events management etc.

We have also applied for Full Cost Recovery for salaries to support time spent on the project by the Education Manager and Grants and Administration Officer, who will respectively support programming and community co-creation, and lead on the matchfunding for the project and Round 2 preparation.

What work will you do during the development phase of your project?

Tell us about the key tasks you need to complete during your development phase. Tell us how you will produce all of the supporting documents required for your delivery phase application. [Text field – 5,000 characters] [4517]

We estimate receiving our Round 1 permission to start in September 2024, with site clearance being undertaken by our volunteer team between grant notification and permission to start. We also plan to begin procurement at risk during the period prior to Permission to Start;

particularly for the Project Manager and Project Coordinator who will then lead on procurement of other roles.

A Multi Disciplinary Design Team will be appointed (Architect, Principal Designer, Structural Engineer, Mechanical and Electrical Consultants, Other Specialist Consultants and Surveyors eg. Drainage and Ecological). The MDDT will develop the current scheme from RIBA 2 to RIBA 7 - with a break between the Development / Delivery Phases. The details for this are included within the supporting documents. A Quantity Surveyor, Activity Planner, Business Planner, Interpretation Planner, Development Appraiser and Evaluation Consultants will also be appointed according to our Procurement Strategy.

The Grants and Administration Officer will support match funding applications and the management of grants, working to the Fundraising Strategy that is already in place, supported by the Project Manager and managed by the Project Coordinator, aiming to close the current funding gap by the end of the development phase in readiness for the Round 2 application.

RIBA Stage 2 will begin in October 2024, with the first meeting with the Planning Committee and Pre-Planning commencing in January 2025. RIBA Stage 3 will then begin in February, with design development ongoing through to June 2025. Planning applications will then commence in July, with contingency allowed to absorb scheme changes and planning delays then built in throughout the autumn. Consultation and co-production will be ongoing throughout this period, with supporting documents (valuations, development appraisals, business plan, activity and interpretation plans) prepared and submitted in advance of the Round 2 application and end of the development phase in February 2026.

By the end of the development phase, the scheme will be fully developed to RIBA 4, pilot activities will have been developed, delivered, and evaluated, and we will have agreed partnerships with community organisations for the delivery phase of the project. We anticipate that the work of the Historian in Residence will further inform the activities we will deliver and that our volunteers, staff, and trustees will have developed the skills needed to be successful in the Delivery Phase.

During this phase, we will also undertake critical preparatory and enabling works for each building, setting a foundation for the restoration.

The associated activity plan for the development phase focuses on audience research, comparator churches research, consultation activities, partnerships development, Stage 2 application preparation, community access advisory visits, volunteer policy creation, and training programs. It emphasises audience engagement, learning from successful models, feedback through surveys and focus groups, developing local and regional partnerships, and preparing comprehensive applications and policies. The activities aim to enhance inclusion, participation, heritage awareness, and organisational sustainability through targeted research, consultations, partnerships, and volunteer engagement strategies.

All our activity will be monitored through a benchmarking evaluation at the beginning of the

development phase, carried out by the evaluation consultant as part of the enclosed Briefs, and then monitored throughout.

A detailed development phase programme has been included within the supporting documents.

Who are the main people responsible for the work during the development phase of your project?

Provide detailed information about the team that will work on your development phase, including the person who will take overall responsibility. Explain who is responsible for making decisions and approving changes to your project. Describe the reporting structure and how often meetings will take place. Describe how you will choose the services and goods needed during your development phase.

You will also need to send us briefs for any consultants for your development phase. You can upload these later in the application.

[Text field – 5,000 characters] [2703]

The Trust has taken a risk averse approach to project management, ensuring there are skills, knowledge and capacity at both a strategic and operational level.

The project will be managed in partnership between SOPPT and the Project Coordinator. However, the main work of the development phase will be managed by the external Project Manager appointed through an externally commissioned brief, working closely with the Project Coordinator recruited with support of the funding. Overall responsibility and decision making will sit with the Board of Trustees.

The Board of Trustees is well suited to supporting the development of the project, in particular through Michelle Behr. As head of the soon to be created Project and Capital Working Group, Trustee Michelle Behr's background in historic property development will ensure a high level of scrutiny during this phase of the works.

The external Project Manager will be appointed through an open, fair and competitive recruitment process, carried out At Risk after grant notification but prior to Permission to Start (PTS), in line with NLHF guidance, and will be responsible for coordinating other members of the consultant team.

The Project Manager will convene monthly meetings with the Project and Capital Working Group to discuss and ratify major issues and monitor against the Risk Register. The appointed external Project Manager will be required to be experienced in NLHF project reporting; they will work closely with the internal Project Coordinator to do so, and will be required to attend regular project update meetings with the project team, including representation from the

Trustees. The Risk Register will be reviewed at these meetings as a standing agenda item, ensuring any potential issues are flagged and prompt mitigating actions taken.

Also appointed during this phase, following our approved and NLHF compliant procurement process by the Project Manager will be other consultants including the Multi Disciplinary Design Team, Quantity Surveyor, Activity Planner, Business Planner, Interpretation Planner, Development Appraiser and Evaluation Consultants. The briefs for these roles are appended to this application.

The Community Engagement Officer will support the existing Education Manager to develop relationships with community partners and deliver community activity on site. The Historian in Residence will also be appointed to explore the history of St Osyth Priory and to engage our volunteers and community with the heritage of the site. The Historian in Residence will undertake research into the history of St Osyth Priory; this could include existing collections held by St Osyth Museum, a related historic event or topic or respond to an identified gap in the existing body of historical work. The outputs of this will inform the ongoing development of the Activity Plan.

Who are the main people responsible for the work during the delivery phase of your project?

Provide detailed information about the team that will work on your delivery phase, including the person who will take overall responsibility. Tell us if you will need extra support from consultants or new staff. Explain who is responsible for making decisions and approving changes to your project. Describe the reporting structure and how often meetings will take place. Describe how you will choose the services and goods needed during your delivery phase.

You will also need to send us:

- project management structure
- briefs for any consultants

If you are sending us a project business plan, tell us where to find the information above in this. You can upload any of these supporting documents later in the application.

[Text field – 5,000 characters] [3158]

With overall project responsibility remaining with the Board of Trustees - with Michelle Behr as the Head of the Project and Capital Working Group, the project will continue to be managed in partnership between SOPPT, the external Project Manager and MDDT working closely with the Project Coordinator.

Michelle has a passion for architectural history and conservation with a proven track record in heritage renovation, design and construction in the luxury hotel sector. She has directed multi-million-pound hotel renovations at properties around the world with a specific focus on historic properties, including monastic buildings, for multiple hospitality groups such as

Belmond in London and Highgate and Loews Hotels in New York City. She is skilled in analysing sites for development, contributing to acquisitions strategy, developing feasibility studies and executing major design and construction projects.

As a PhD candidate in Architectural History at University of Cambridge, her research focuses on the early history of historic country houses converted to country house hotels. She also holds a Master of Studies in Building History from Cambridge and Master of Science in Real Estate Development from New York University. Her passion for heritage conservation has led her to volunteer with the London based heritage charities The Georgian Group, overseeing the Heritage at Risk Register and social media content, and SAVE Britain's Heritage, assisting with their Buildings at Risk Register.

This phase in particular will also benefit from the guidance and knowledge of Trustee Tim Sargeant. Tim has extensive knowledge and a proven track record in property development, specialising in the award-winning complex restoration and renovation of heritage buildings, adding significant experience in the delivery of complex capital works.

The externally commissioned Project Manager will convene monthly meetings with SOPPT's Working Group to discuss and ratify major issues and monitor against the Risk Log. They will have been appointed through a competitive open tender process and carefully assessed for suitability for the project.

The funded Project Coordinator role will represent the interests of the Trust, coordinate sign off and communications with the Trustees, liaise with the Project Manager, QS, MDDT and externally appointed consultant teams, support the Round 2 Application Process and support the management of the programme of capital works through the development and delivery phases.

The Community Engagement Officer will continue to support the existing Education Manager to develop relationships with community partners and deliver community activity on site in line with the Activity Plan.

We have included with our application the main site wide business plan for the wider St Osyth Estate that the Trust co-produced and that was approved by Tendring District Council; as well as the working Outline Business Plan for the Trust's Project itself. The details outlined above are included within the Trust's Business Plan, in Section 3 - Governance and Management Structures.

What work will you do during the delivery phase of your project?

Provide outline information about what your project will do during your delivery phase.

[Text field – 5,000 characters] [3594]

We estimate receiving our Round 2 permission to start towards the end of August 2026.

After tender review, planning discharges and the appointment of the contractor, work prelims will begin, with construction beginning by October 2026. Fit-out and interpretation installation will begin in June 2027, with RIBA 6, site handover taking place by November 2027.

The site should then be at RIBA 7 and be fully open by the end of December 2027, with evaluation and the activity period completing by the end of February / March 2028.

The proposed schedule of works for the delivery phase are based on a comprehensive approach to preserving and enhancing the structural integrity, functionality, and historical value of the three buildings, focusing on sustainable materials, energy efficiency, and a fundamental respect for the original architectural features and listings of the buildings.

During this period our draft plans mean that our delivery activity programme will deliver a range of outputs, focusing on interpretation, volunteering, training, formal and informal learning, wellbeing, community events, and general activities. These include interactive site features, family-friendly activities, animated films, volunteer recruitment, ongoing staff and volunteer training, school sessions, wellbeing programs, and community engagement events. Each activity is designed to enhance heritage appreciation, inclusivity, and participation among diverse audiences, contributing to the project's goals of heritage preservation, community engagement, and educational outreach. These activities will help to further develop relationships with existing community groups, and pilot and test what we will deliver from the newly developed spaces once completed.

At the end of the project, our evaluation report will summarise the summative social and economic benefits of the project for the Trust and wider Tendring area, and we will share our findings and learnings within the sector and our networks and use these to fully inform our future work.

How do you plan to cash flow the delivery phase of your project?

Grant payments are made in arrears. You therefore need to ensure you are able to successfully cash flow the expenditure of your project in order to avoid experiencing financial difficulties. The exception to this is a development grant of less than £250,000. You will need to provide a cash flow with your delivery phase application.

Tell us about any financial reserves, income from your organisation or other sources of funding you will access to cash flow the delivery phase of your project.

[Text field – 5,000 characters] [1176]

We have already secured a total of £1.178M in match funding for both the development and delivery phases of our project, which will ensure that we have sufficient funding to cash flow the project. We currently have £178,393 of this held in Escrow that is available for us to draw down for this project from the related Section 106 funding, so would be able to mobilise on the project pending the first grant drawdown.

A range of further cash facilities are available to support the cash flow which we will fully explore following Permission to Start, including through our own banking and potential underwriting from the Local Authority. Our policy to maintain cash reserves to cover day-to-day costs will further support this.

At the end of February 2024, the Trust had s106 escrow monies of £178,393 plus £88,339 in unrestricted funds. At present, our policy is to maintain reserves sufficient to cover day-to-day costs whilst the Trust becomes established, and to look to build reserves for future charitable projects in connection with the St Osyth Priory conservation work.

We will progress with our remaining match funding campaign in line with our fundraising strategy and close the current funding gap before our Round 2 Application.

It is worth noting that while our VA Tregistration is yet to be confirmed, we have cautiously assumed that no VAT will be reclaimable. A change to our VAT position will be explored during development as this will significantly help to ease cash flow and reduce the overall project capital requirement.

Delivery start date.

This can be an estimate.

August 14th 2026

Delivery end date.

This can be an estimate.

February 28th 2028

Are there any fixed deadlines or key milestones that will restrict your project's timetable?

Please tell us about any immovable dates that will affect your project and are beyond your control.

For example:

- dates when partnership funding offers may expire or when secured funds must be spent by
- anniversaries that your project is designed to celebrate
- external events that are key to your project's success

[Text field – 5,000 characters] [1003]

Yes - we must make sure that we have all our match funding secured and in place in order to make a successful round 2 application.

We have a detailed match funding strategy in place, which is appended to this document, and which includes targets that total the £850,000 funding gap. The aims of the strategy are to meet short-term project capital and revenue funding needs, as well as to create new funder relationships and income streams for the longer term.

High-value trust and foundation targets include the Bernard Sunley Foundation, Garfield Weston Foundation, Linbury Trust, Wolfson Foundation, Esmée Fairbairn Foundation, Arts Council England and the Jack Petchey Foundation. We will also look at High Net Worth Individuals and all other funding opportunities as part of a holistic, end-to-end fundraising approach.

The Grants and Administration Officer will ensure that there is appropriate capacity and skill to action the strategy effectively, including any further opportunities that may arise.

SECTION 4. OUR INVESTMENT PRINCIPLES

Our four investment principles will guide all our grant decision making under our 10-year strategy, Heritage 2033. Our investment principles are:

- saving heritage
- protecting the environment
- inclusion, access and participation
- organisational sustainability

You must take all four investment principles into account in your project. You may focus more on some investment principles than others.

For example:

- if your project is focused on restoring natural landscapes, you might want to emphasise both saving heritage and protecting the environment in your application
- if your project is focused on recording and sharing oral histories and skills development, you might concentrate more on inclusion, access and participation and organisational sustainability

The strength of focus and emphasis on each principle is for you to decide and demonstrate.

Explain how your project will save heritage.

[Text field – 5,000 characters] [2485]

St Osyth Priory is listed as one entity on the Heritage at Risk Register and the Trust have worked closely with the Sargeant family and Tendring District Council to develop a site wide business plan that aims to remove the listing by 2030. Delivering this, in a way that benefits the local community and is financially sustainable are the key drivers for the Trust and this project specifically. The defined objects of the Trust are:

“The Preservation for the benefit of the public of the buildings, monuments and land of particular historical, architectural or construction interest firstly at St Osyth Priory and secondly St Osyth Parish.”

The project will restore three at-risk buildings - combined with the work being delivered elsewhere on the site under the stewardship of the Sargeant Family. A total of 5 buildings from the 16 identified on the HAR Register will have been repaired, and the target is to repair 10 by 2030, including the full restoration of the Cart Lodge and Abbot's Tower, in line with the Section 106 agreement.

Currently in poor condition, the heritage of the buildings involved in this bid will be protected and better preserved for future generations, while ensuring it is also an environmentally sustainable development - both through construction methods and harnessing renewable and green energy solutions.

Despite spanning over 1000 years of history, The Priory site has been significantly under-researched and therefore this is a key outcome of the project that also responds to the THS Education priority.

Through this project, the Trust intends to appoint a Historian in Residence to research one of a number of themes identified as priority based on general public surveys about the areas of highest interest. In addition to providing written reports that can supplement existing research about the Priory and St Osyth, the successful Historian will also work with both SOPPT volunteers and St Osyth Museum to develop their research skills, meaning that high-quality research can continue beyond the lifetime of the project.

The Trust will therefore have a greater understanding of the heritage of the site, and the research produced as a result will inform interpretation and education resources.

The Historian will be expected to support delivery of events and activities that allow the community to participate in and contribute to their research, capturing the more recent history

of the site, such as people's childhood memories of visits prior to the site's closure over 25 years ago.

Explain how your project will protect the environment.

[Text field – 5,000 characters] [3738]

Our obligations in the context of both the global climate crisis and our work as a responsible Trust, are central to our commitment and undertaking as part of the development of the Tithe Barn, Old Dairy and Cart Lodge - particularly on a site surrounded by natural environmental beauty. We will work to embed this in our approach from capital works, to activity planning, through to the delivery and running of the completed site.

We are committed to reducing the carbon impact of the capital works programme, which we will work with the Project Manager (PM) to achieve, by building in the following measures:

- Reuse of existing materials, such as roof tiles - or using reclaimed heritage materials, wherever possible
- With the help of the MDDT, investigating the use of ground-source heat pumps and solar panels during the development stage. GSHP provides a clean way to heat buildings, free of all carbon emissions on site. It makes use of solar energy stored in the ground to provide one of the most energy-efficient ways of heating buildings - and can be used to moderate the temperature within the buildings. Solar panels would reduce demand on the national grid, and where possible, allow export to the grid at times of low usage
- Redistribution of top soil from ground works to the site, to be used elsewhere for landscaping purposes, eliminating the need for disposal and transportation
- Reuse of materials to create art installations
- Where possible, creating interpretative objects and installations from heritage items reclaimed from the site - including use of a cart as an attractive planting feature
- Rainwater harvesting for use in watering surrounding landscaping and gardens
- Installing and promoting the use of recycling facilities on the site - for use by the commercial operator, community groups using the barn, and members of the public visiting the site
- Using locally sourced products, and encouraging the commercial operator and hirers of the space to follow this example as part of their lease/ rental agreements
- Not using single-use plastics

We are planning to become members of Fit for the Future, an environmental sustainability network, to connect with other charities and heritage organisations to share in best practice and an exchange of ideas. We will additionally carefully consider the environmental credentials of contractors as part of the procurement process. Our development phase budget also has an allowance for undertaking a detailed environmental sustainability review, to ensure that we are building in as many carbon reducing measures and policies as possible into our planned ongoing operations.

We also hope that through our programming, we will be helping to mitigate and limit environmental impact and bring about positive behaviour change from a young age. The 200 acres of Parkland provides the green spaces for the community (including our pond dipping areas) which are an essential part of wellbeing and creating an environment which is an attractive place to live. We already cover science and maths topics with nature surveys and activities, taking advantage of having access to ancient trees, ponds and rare breed livestock and deer - our intention is to continue to build our STEM offer through the increased spaces and capacities that this project will afford.

Our activity plan will also provide Health and Wellbeing Walks; gentle, mindful walks led by a facilitator exploring the the Priory grounds for those with mental or physical health needs, as well as paid for events linked with the Priory's heritage (e.g. foraging walk, discovering aromatherapy and traditional uses of plants), all of which will increase awareness and appreciation of the natural environment and bring about positive change in behaviours.

Explain how your project will increase inclusion, access and participation.

[Text field – 5,000 characters] [4439]

“Opening to the public will allow the assets to be better understood and appreciated. This will enrich the lives of the young and old alike, providing an aesthetic and educational resource that will build local pride in the quality of the historic and natural surroundings – improving quality of life” (St Osyth Public Consultation, 2016)

Located in Tendring and neighbouring Jaywick - one of the most deprived towns in the UK - the timing of and need for this project is vitally important. Particularly post pandemic, the need for a venue that can provide wellbeing facilities and community support, delivering a positive social impact within our locality has never been greater. Tendring District has the highest percentage of residents aged 65+ in Essex, and a higher old-age dependency ratio than other areas in Essex.

We have worked to develop activities relating to conservation and/or that will have a positive impact on the following identified issues in the local area:

Higher than average take up of free school meals

Lower than average GCSE results

Higher than average childhood and adult obesity levels

Higher than average teen pregnancy rates

High unemployment and low skills base

Unemployment rates in the surrounding area are high (5.6% in Tendring vs 3.7% UK average in 2023) and this has been taken into consideration when activity planning and developing local community partnerships. The activities detailed in the Action Grid reflect the desire of the Trust to make a positive impact; where the current and future use of Priory buildings reflects their monastic beginnings as a place of sanctuary and support for the community. This includes activities that develop skills and confidence, inclusion of a transport bursary to remove the largest barrier to access, and creating additional employment in the area through both the wedding venue and the activity of the Trust.

After being closed to the public for many years, we are excited to already be delivering increasingly wide opportunities for more people to come to this wonderful site - through our education centre and wider community events with 2458 people welcomed to site in the last 12 months. In 2023 we held 2 large scale public events organised by the Trust. Our Coronation Picnic gave hundreds of people the opportunity to explore the Estate, go up the tower, enjoy a tractor trailer tour and live music in the Precinct. Working with Black Jacket events we were also able to hold a Community Christmas Light Switch-on event. This included a craft stall, local food stands, community carol singing with the Salvation Army Band and Children's crafts.

Opening the new spaces will enable us to tap into huge opportunities to build and broaden our reach and impact and build pride in place. There is also a provision within the Section 106 agreement that the public will be granted access to the site for a minimum number of 80 days annually, which would be the minimum amount of activity and access that we would seek to deliver through our work.

The draft action grid that we have prepared for the development phase is full of activities that will welcome a variety of people to enjoy the site in different ways and we have considered how we will evaluate the success or impact they have had.

In the development phase, we will also host a Community Access Advisory Visit from Point Clear & St Osyth Disabled Persons Club to assess and give guidance on ways to improve physical access of the site as well as our emerging interpretation and activity proposals, which we will then continue to co-create with them.

Our work and consultation to date through the Education Centre with organisations such as HomeStart, Doucecroft, Essex Book Festival, Colne Community and All Saints Brightlingsea will form the basis of long-term relationships, allowing the activities of the Trust to reach a wide range of people and to ensure there is an ongoing dialogue and understanding of the barriers and opportunities in engaging with the project.

We will deliver a minimum of two Level 1 Construction Trade Apprenticeships in a potential collaboration with Tendring Education Centre - delivered and funded as part of our contract with the capital works owner. We will also create work experience placements in association with Clacton Coastal Academy or Tendring Education Centre to provide paid work experience opportunities for young people aged 16-25 in a variety of areas such as marketing, heritage-learning, events management etc.

We will also develop accessible digital resources to help us increase our reach and impact; creating an Animated Short Film about St Osyth and the heritage of the Priory for use online and in the visitor centre. This will be developed with content from the Historian In Residence role, and co created with input from volunteers and young people.

Explain how your project will improve your organisational sustainability.

[Text field - 5,000 characters] [4986]

By prioritising the full repair and conversion of the Tithe Barn and Old Dairy, the Trust will have an income through the lease to the commercial operator that will support the activity of the Trust's education and community work, in addition to working as a seed for further restoration projects to other at-risk buildings across the wider site.

We consider financial sustainability key to the success of not only this project, but the conservation and protection of the Priory as a whole. Options appraisals by Colliers and Savills agree that a wedding and celebration venue is the most economically viable commercial option.

Recognising the limit of funds, we faced a difficult decision as to how to deliver renovation and repair works to the many buildings in need at the Priory. The rationale we have taken is to prioritise long-term financial sustainability, as ultimately, the income from commercial hire and community hire of the Tithe Barn and Old Dairy will allow us to deliver more projects and save more buildings. Income from the commercial operator and paid for community events will provide funding for other projects the Trust wishes to deliver in addition to its educational activities, providing longer-term financial sustainability for the Trust. As a result, we are focusing on works that will drive greater commercial income. The current business plan

estimates the Tithe Barn complex will make a substantial profit of £183,037 by the end of the first operating year alone, including a 50% contribution to the sinking fund.

The Abbot's Tower is in some ways, a smaller project, with repair costs estimated at c£1M and much loved by the community, who are clear that they wish to see it restored. The Trust are keen to make this a reality, however neither the Cart Lodge nor Abbot's Tower would produce the same return on investment, and therefore in order to achieve its long term goals, the Trust must maximise the money available through the Section 106 agreement. Neither would generate the income required to supplement match funding for the works to the Tithe Barn and Old Dairy should the phasing be reversed.

Options' appraisals have shown that conversion to usage suited to a wedding and celebration venue run by a commercial operator will provide the Trust with a sustainable annual income whilst also maintaining public access; due to challenges in accessing the estate, and the local and tourist demographics in the region, it would not be viable to operate solely as a community venue or tourism destination. It also highlighted that there were some barriers in attracting an operator to the location: Black Jacket are already operating very successfully on the site and have a proven track record which derisks the model further. Subject to procurement and agreed commercial agreements during Development Phase, using a single operator for the site may also ensure that, in alignment with the site business plan, that the other complementary events and accommodation businesses can be operated at St Osyth simultaneously to ensure maximum return on investments on the Priory site.

The terms of the commercial lease agreement and the Section 106 agreement itself will guarantee a minimum level of use for the Trust to host community activity once the capital works are completed; this model allows access at a level equal to anticipated public demand without the burden of being responsible for day-to-day management of the buildings. Equally, if the Trust prioritised the Tower it would receive minimal income from the limited activities it can host, whilst using a significant proportion of the match funding that is currently available.

Our intended use of the restored buildings also allows us to have diverse more resilient sources of income; examples of which - taken from our Activity Plans - include:

Host larger, three and four form entry schools which cannot otherwise be accommodated at the Education Centre

Expand our education programme with offers linked with the national curriculum. Focus on History (local studies, monastic and tudor heritage) along with STEM subjects (e.g. construction, maths, biology, biodiversity)

Host Community Pop-Up Exhibitions

Develop an offer for uniformed and other groups involving incoming generating sleep outs in Tithe Barn and associated heritage activities

Develop a mixture of commercial and free to access wellbeing sessions and events
Generate commercial, market competitive rent to the third party operator for external weddings and events
Host income generating family fun weekends and festivals

We will support sustainability through heritage skills development; piloting traditional Skills Workshops. We will offer a set number of places that are free and discounted rates for VCSE groups), and will be teaching traditional skills such as brick making and willow weaving - techniques were utilised historically at St Osyth, adapting these to suit audiences with varying needs.

SECTION 5. AFTER THE PROJECT ENDS

How will you maintain the benefits of your project and meet any related costs?

Tell us how you will manage the benefits of your project after the funding ends.

For example:

- what will happen to the things you produce as part of the project, for example if these will be donated to a local archive or kept on display by your organisation
- how you will manage the heritage in the future, for example if you will keep employing staff to help maintain a site you have restored
- how you will deal with any costs related to maintaining the heritage once the project ends, for example utility costs for a newly opened building

[Text field – 5,000 characters] [2777]

SOPPT has already begun to establish a track record of successful project and grant management.

Through working closely with the PM and careful business planning during the development phase, we will be able to ensure that we are able to generate enough income from the commercial rent of the completed buildings for the Trust to continue to be sustainable in the long term; covering our core costs, supporting our educational work and reinvesting in the development and preservation of further important historic buildings on the site.

The activity programme will also help to build greater awareness of, and engagement with, the schools programme - which will both extend the reach of the Trust's work and purpose, and contribute towards commercial income. The Trust will also ensure that use of the site is a mix between free and paid-for activities which will be designed to cover operating costs at a minimum. Throughout the life of the project, we will also carefully manage our project contingency, to avoid using any accrued reserves.

We are aware of the additional insurance, maintenance, management and overhead/ running costs that will be incurred after project completion, and these will be shared with the commercial operator - the Trust will only be required to contribute a % equivalent to use, and this will be reflected in our business planning and commercial agreement with the operator.

Volunteers and staff will also have received training and improved or learned new skills as a part of this project and a core outcome, which will boost organisational resilience and skills levels, and remain as a legacy of this project. We will also, as part of the project evaluation, carry out reflective interviews and 1-2-1s with key staff and contractors to capture lessons learned and document this for future reference and ensure ongoing learning and development.

As part of the recruitment of our business planning consultant, we would like to build change management and planned organisational growth and scaling into our business plan. Subject to review we would also look to continue and embed the Community Engagement Officer role into the organisation in the long-term to ensure management and development of our ongoing activities and audiences to embed social impact. We have also developed an aspirational organisational model to underpin our planned activities including volunteer, facilities and financial management, to ensure staffing is in place that alleviates dependence on Trustee led activity.

Having recently undertaken a detailed governance review and skills audit, we have additionally allowed for professional fees during our development phase to deliver governance and organisational development, to ensure that this is all robustly underpinned.

How will you evaluate the success of your project and share the learning?

You must evaluate your project and provide a written evaluation report once you finish your project.

You will need to create an evaluation plan at the start of your project. This will be an outline of how you are going to collect data to measure, analyse and understand what you are doing and ultimately to provide evidence about what your project has achieved.

Tell us who will carry out your evaluation. This could be staff within your organisation or a person or organisation who you will need to employ. You should provide a brief for this work as a supporting document. We would expect to see costs for your evaluation included in your project costs.

[Text field – 5,000 characters] [2712]

Our previous CRF/ NLHF project experience to date has helped us develop our evaluation skills so that when interpretation, activities and events are developed, this happens with evaluation built-in from the outset, so that we can meaningfully measure the impact of the project on people and communities against outcomes.

The Trust has already begun to consider what success would look like and how it could be measured through the creation of the draft activity plan included in our supporting documents. Collection strategies will include both qualitative and quantitative aspects and we have developed SMART targets and KPIs for the activities so that we can meaningfully measure impact and progress against NLHF investment principles.

In addition to considering evaluation from the start of the project, the openly procured Evaluation Brief will ensure this is assessed independently and embedded throughout all that we do. This will include the creation of a project evaluation framework that includes identification of key review points that allow us to adjust our approach as necessary. This will also capture the Social and Economic Impacts of the project, which are key to the delivery of our business plan and will significantly contribute to the Tendring Economic Strategy and Tendring District Council Corporate Plan.

We will also ensure that as part of their brief and job description, internal staff roles for the Community Engagement Officer, Project Coordinator, Education Manager and Grants and Administration Officer will contribute to the delivery and collection of evaluation data.

We have already created an outline activity grid, included as part of our supporting documentation, and the consultant will create a Theory of Change for the project to underpin our evaluation and ensure we consistently work towards clear project outcomes, as part of an iterative process.

We intend to embed our project-learning throughout our networks. Michelle Behr is a member of The Georgian Group and SAVE Britain's Heritage, and could use these platforms to talk about, share learnings from and evaluate this NLHF project. The St Osyth Priory site is also a member of Historic Houses, and we would similarly look to share what we have learnt through their networks.

Additionally, we have previously been invited to speak to the Ambitious Women in Essex Network and engage with the Essex County Council Economic Growth and Localities forum, which would also be high profile ways to cement the project legacy and learning.

We would also ensure that we updated our Lessons Learned document throughout the project to ensure that we are able to pass our project learnings and knowledge onto future board members.

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[Project Budget + Supporting Docs + Declaration]

Appendix IV: Form of Tender

(Also provided as Word document)

Please complete this form and include it with your responses to the questions in the Brief.

Project: St Osyth Priory and Parish Trust

Professional Service: Business Planning, Development Appraisal and Valuation Consultant

Name of Tenderer:

I/We, the undersigned, do hereby offer to execute and complete the above mentioned professional services in strict accordance with the Schedule of Services for the following lump sum fee:

£ _____ excluding VAT for the Development Phase

1. Resources for Development Phase – Business Planner

Please state the day rate, number of days, and total fee proposed for the Development Phase:

Title	Day rate (£)	Resource Days RIBA Stage 2 including Development Phase Review August 2025 – December 2025	Resource days RIBA Stage 3 including R2 submission January 2026 – August 2026	TOTAL FEE
Director				
Associate				
Senior				
Consultant				
Other – please specify				
TOTAL				

The above day rates will be utilised to negotiate any additional works that may be required if deemed to be beyond the reasonable scope of the works specified. All day rates are to be based on a 7.5 hour day and are to include allowance for disbursements.

Resources for Development Phase – Valuation Consultant

Please state the day rate, number of days, and total fee proposed for the Development Phase:

Title	Day rate (£)	Resource Days	Resource days	TOTAL FEE
		RIBA Stage 2 including Development Phase Review	RIBA Stage 3 including R2 submission	
		August 2025 – December 2025	January 2026 – August 2026	
Director				
Associate				
Senior				
Consultant				
Other – please specify				
TOTAL				

The above day rates will be utilised to negotiate any additional works that may be required if deemed to be beyond the reasonable scope of the works specified. All day rates are to be based on a 7.5 hour day and are to include allowance for disbursements.

2. Expenses and Disbursements

The fee offer is to include all expenses and disbursements (including printing charges).

3. Offer Period

This tender/ offer is to remain open for a period of 90 days from the date fixed to the return of tenders.

	Tenderer to provide responses. Some are pass/fail
Name of firm or company	
Postal address	
Registered address (if applicable)	
Company number (if applicable)	
Please indicate if you are: a sole trader, partnership, Public or Private Limited Company or other type of organisation	

Main contact	
Contact telephone number	
Contact email address	
Please indicate your level of Public Indemnity Insurance, the policy number and expiry date. ¹	
Please indicate your level of Professional Indemnity Insurance, the policy number and expiry date	
If relevant, please indicate your level of Employer's Liability Insurance, the policy number and expiry date	
Signature of authorised person	
Name of authorised person	
Capacity in which signed	
Date	

¹ If you do not have any of these insurances, please indicate if you will purchase them if awarded the contract - £1m cover for Professional Indemnity and £5m for Public Liability