



Notes on completion

Summary

Name of your organisation

South Gloucestershire Council

Project title

In no more than 15 words, please choose a title which you think best describes your project. This will be seen externally, on our website and by our decision makers so please ensure that you choose a title that you are happy for a wide range of people to see.

Refurbishment of Winterbourne Medieval Barn

Reference number

HG-15-04570

Project summary

In no more than 150 words, summarise your project. We will use this text to tell people about your project, including our decision takers.

The Winterbourne Medieval Barn Project will restore and find new uses for the magnificent 14th Century Court Farm Barn and associated outbuildings, ensuring long-term sustainability for the complex by placing them at the heart of the local community. People of all ages will have opportunities to learn about the history of the Barn and surrounding area, have space for hire and to participate in a wide range of events and activities.

The Project will:

- Complete restoration and refurbishment of the Barn and outbuildings
- Improve on-site facilities to enable the site to be used as a venue for income-generating events
- Create a heritage education centre and develop an exciting educational and heritage interpretation programme
- Create display and interpretation spaces, covering the history of the site, its agricultural heritage and surrounding area for locals and visitors
- Explore potential of the site for rural/social enterprise.

Have you received any advice from us before making your application?

Yes

Please tell us who you received advice from.

Richard Bellamy, Thomas Brewer, Kelly Sprye-Hare, Nerys Watts

Is this your first application to the Heritage Lottery Fund?

No

Please tell us the reference number and project title of your most recent application.

HG-14-08439

Section one: Your organisation

1a Address of your organisation:

Address line 1	Council Offices
Address line 2	Badminton Road
Address line 3	Yate
Town / city	BRISTOL
County	
Postcode	BS37 5AF

1b Is the address of your project the same as the address in 1a?

No

Enter the address of your project. Please use the post code look up button to find your address so that the Local Authority and Constituency information is generated in the boxes below.

Address line 1	Winterbourne Court Farm Barn
Address line 2	Church Lane
Address line 3	Winterbourne
Town / city	BRISTOL
County	South Gloucestershire
Postcode	BS36 1SE

Local Authority within which the project will take place

South Gloucestershire

Constituency within which the project will take place

Filton and Bradley Stoke

1c Details of main contact person

Name

George Kousouros

Position

Community Enterprise Officer, South Gloucestershire Council

Is the address of the main contact person the same as the address in 1a?

Yes

Daytime phone number, including area code

01454868152

Alternative phone number

07742987445

Email address

sue.parsons6@btinternet.com

1d Describe your organisation's main purpose and regular activities

This is a bid led by South Gloucestershire Council. South Gloucestershire Council is a Unitary authority with approximately 12,000 employees. Its main function is to serve its residents with both statutory and non-statutory services

South Gloucestershire Council will work with Winterbourne Medieval Barn Trust in the development and completion of the Project. On completion the aim is that the complex will be able to become economically self sufficient and at that point the Council will give Winterbourne Medieval Barn Trust a full lease. The Trust will also support the project by acquiring match funding during the Development Phase of the Project

The Winterbourne Medieval Barn Trust is a company limited by guarantee and a registered charity. It organises a range of community, social and cultural activities throughout the year and provides access to an important heritage asset. The charity has the following objects:

- Promote and undertake the conservation, restoration and management for the public benefit of Winterbourne Court Farm Barn and surrounding land
- The advancement of the public's knowledge and understanding of the history and local vernacular architecture of Winterbourne Court Farm Barn and its surrounding landscape and the history of food production, storage and preparation of food and farming methods generally in the surrounding area, by the provision of facilities for guided tours, exhibitions, talks and other such means as the trustees shall from time to time determine

1e The legal status of your organisation

Please select one of the following:

Local authority

If your organisation is any of the following, please provide the details shown:

Company - give registration number

Registered Charity in England, Scotland or Wales - give registration number

Charity recognised by HM Revenue and Customs in Northern Ireland - give reference number

1f Will your project be delivered by a partnership?

No

1g Are you VAT registered?

Yes

Please provide your VAT number

664 3211 52

Section two: The heritage

In this section tell us about the heritage your project focuses on and why it is valued.

2a What is the heritage your project focuses upon?

Winterbourne Medieval Barn is a building of national significance and Grade II* listed. It has been described by Historic England as an exceptional survival of national importance. It is an outstanding example of a raised-cruck construction, one of the largest and earliest of its kind, and the original roof structure remains largely intact.

Winterbourne Court Farm Barn is believed to be a unique survivor of a very small number of medieval barns built by the lord of the manor for his own use. It has been dated by dendrochronology to 1342

In 1328 the manor of Winterbourne was held by Thomas de Bradeston. He and his family are believed to have come from Breadstone, near Berkeley, Glos. After the accession of Edward III he became attached to the royal service, taking part in all of Edward's military campaigns as well as frequently serving in parliament. He had two major impacts on Winterbourne. First, he built Winterbourne Court Farm Barn (this building) Second he enlarged the adjacent church virtually to the size that can be seen today, though there have been many alterations and renovations since the 14th Century.

The Barn originally measured 143ft x 26ft internally and would have had at least eleven bays with two great entrance porches. It would have been larger than needed for farming so was clearly a statement of power and wealth. Barns were always multi-purpose buildings – crop storage, crop processing, housing animals, especially sheep at lambing time and village festivities, for which it is once again being used.

Additional information on the history and heritage of the complex are contained in Supporting Information WMB1.

The Barn has been in almost continuous use as an agricultural building since 1342. It is located on the outskirts of Winterbourne adjacent to a 12th century Parish Church and close to Monk's Pool and the Three Brooks Local Nature Reserves. The Barn, church and hamlet were designated as a Conservation Area by South Gloucestershire Council in 2005.

The Barn suffered a long period of neglect and was rediscovered In the 1980's. With a lot of community lobbying and support , it was recognised by the Local Authority to be a building of national importance. Steps were then taken to compulsory purchase the site and to make it available for the community.

2b Is your heritage considered to be at risk? If so, please tell us in what way.

In 2002 SGC carried out works to avoid further deterioration/damage by securing the roof and weatherproofing the walls. However the attached West Barn and other ancillary buildings are in a very poor state of repair and at risk of further degradation. They also detract from the main Barn.

Following this initial restoration work the complex has been used, under licence, by Winterbourne Medieval Barn Trust for a series of activities including cultural events and open access events such as Orchard Harvest Days which involve the local community. Maintenance of this iconic asset has only been possible with considerable financial support from South Gloucestershire Council in addition to minor income generated by events. However the future of the Barn is dependent on it being able to generate enough income to make it self- sufficient. Reductions in local government funding in future years mean that continued support at the required level cannot be guaranteed. Reduction in essential maintenance will inevitably result in the complex falling into disrepair with a high probability of it ending up on the "At Risk" register again and it would not be possible to continue to use it as a community asset.

2c Does your project involve work to physical heritage like buildings, collections, landscapes or habitats?

Yes

Tell us the name of the building(s), collections, landscape or habitat area

Winterbourne Court Farm Barn

Do you, or a partner organisation, own the building, land or heritage items outright?

Yes

Do you or a partner organisation have a mortgage or other loans secured on the property or item, or any plans to take one out?

No

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

2d Does your project involve the acquisition of a building, land or heritage items?

No

Please tick any of the following that apply to your heritage:

**Accredited Museum, Gallery
or Archive**

**Designated or Significant
(Scotland) Collection**

**DCMS funded Museum,
Library, Gallery or Archive**

World Heritage Site

**Grade I or Grade A listed
building**

**Grade II* or Grade B listed
building**

How many buildings of this type are included in your project?

1

**Grade II, Grade C or Grade
C(S) listed building**

Local list

**Scheduled Ancient
Monument**

Registered historic ship

Conservation Area



Registered Battlefield

**Area of Outstanding Natural
Beauty (AONB) or National
Scenic Area (NSA)**

National Park

National Nature Reserve

Ramsar site

**Regionally Important
Geological and
Geomorphological Site
(RIGS)**

**Special Area of Conservation
(SAC) or e-SAC**

**Special Protection Areas
(SPA)**

Registered Park or Garden

Section three: Your project

In this section, tell us about your project. Make sure you include all your planned activities, and capital works if applicable.

3a Describe what your project will do.

The overall aim is to refurbish/renovate the main Barn and out buildings within the curtilage to their former glory and provide flexible spaces for a variety of community, educational and commercial uses.

The physical works cover the need to stabilise the main Barn, restore the North and South lean-to buildings, refurbish the West Barn, rebuild the remaining cow byres to provide enterprise units for rural crafts and provide full services and facilities to the site. All of this work has been discussed with English Heritage (now Historic England) and the Planning Authority. Alongside the physical refurbishment the project will develop appropriate Interpretation facilities to demonstrate the history of the barn and its architecture as well as information on the local area.

Completion of the physical work will enable the activities at the complex to be increased with greater community involvement. Winterbourne Medieval Barn Trust has been successful up to now in organising activities which have attracted over 3,000 people each year to the complex, and it is a valuable community resource. The activities have ranged from open access events such as Medieval Fayres and Orchard Harvest Day to provision of workshops on rural crafts such as Basket Weaving and Dry Stone Walling. The Trust has also organised cultural events such as Opera and Shakespeare productions which have been well attended. There is close co-operation with the adjacent 12th Century Church and the Annual Carol Service is a joint event with the Church held in the Barn.

Increasing the range of activities will provide opportunities for more people to view the history and heritage of the complex. The lack of facilities has been a key limitation to date. Craft Workshops etc. are primarily held during the Summer months as lack of heating means that other dates are impractical. Lack of appropriate catering facilities imposes a further limitation on potential events. A Consultation Study carried out identified the complex as a potential educational resource for schools and identified links to the national curriculum. This is a development area that will need provision of appropriate Interpretation facilities, which will be covered in the project.

The Project will include a Market and Audience Research Survey which will be used to identify opportunities for future events and activities as well as confirming the long term viability of the Business Plan. This will be carried out in conjunction with production of a detailed Activity Plan which will be used to develop appropriate events and activities on completion of the physical works. Both of these roles will work closely with existing volunteers to ensure continuity after completion of the capital refurbishment and initial activity development.

Completion will also enable the Barn to become economically self-sufficient which will support the development of the overall vision. Further details are shown in the Business Plan and Supporting Documents. This envisages that the complex will be available for Third Party hire to generate sufficient income to cover annual costs and generate appropriate reserves to ensure that future maintenance costs can be covered. This, and other activities, will be managed by paid resources.

After completion of the refurbishment the intention is to lease the complex to Winterbourne Medieval Barn Trust on a full repairing basis. As with previous heritage assets in the area, South Gloucestershire Council (SGC) will provide interim support to the Trust and will only formally lease the site when sustainability is considered to be possible. The Business Plan assumes that full sustainability will take 4 years to achieve, with diminishing financial support over the first three years. The current Business Plan (attached in supporting information WMB2) includes ongoing support of £60K from SGC over the first three years.

3b Explain what need and opportunity your project will address

The project will save and give a viable future to a unique architecturally valuable historic cruck barn which will provide valuable community facilities. It will provide much needed space for a wide range of community activities and enable the community to capture and maintain knowledge of their agricultural heritage and the history of rural life and farming techniques will be made accessible to future generations. This project has evolved from the need to undertake work to the Barn to make it more usable and therefore have a long-term sustainable future.

As a result of significant community effort and lobbying the significance of the barn was recognised, and with the help of the local authority and English Heritage, further degradation of the building was prevented. A trust was formed from within the local community and they have been able to use the site under licence to organise community events such as Medieval Fayres as well as rural craft workshops and cultural events including musical workshops, Shakespeare productions and opera. However the facilities currently available and the condition of the site limit the range of possible activities. An important element of the overall project will be the development of activities to enable more people to engage with an iconic asset and support its long term viability. An opportunity has also been identified for the complex to be used as a powerful educational tool. In view of this a study was carried out which identified the potential for the barn and its history to be linked to the national curriculum.

A consultation was carried out with the local and wider community and this identified the potential for the barn to provide additional facilities and events for the surrounding area.

This project takes the opportunity of the local authority and Winterbourne Medieval Barn Trust working together to achieve this ambition for the benefit of the historic buildings and the local community. The local authority currently has funds available to support the development, but this cannot be guaranteed in the future due to government expenditure cuts enforced on local authorities. This project has arisen from the need to promote and protect our heritage through South Gloucestershire's future development. South Gloucestershire has seen a rapid growth in the last 20 years and a further 25,000 houses are planned in the Council's core strategy. The project will develop a unique building of heritage merit which can be used by this growing community; it will promote the importance of protecting and using our heritage to give it a sustainable future. The story of the barn is the story of the local community, food production and farming. Interpreting the barn and surrounding landscape inspires debates about sustainable food and farming, diet, health and the environment. The impressive structure of the barn provides a powerful tool to capture people's imagination and take them on a physical and metaphorical journey. The barn provides a learning opportunity to reconnect people with the past and with the food they eat. The complex is situated in an agricultural area, and the Barn along with the nearby Church and hamlet have been designated as a Conservation Area. Opportunities for the people to engage with the heritage are currently limited by lack of facilities, and this project aims to address this shortcoming.

3c Why is it essential for the project to go ahead now?

Opportunities for additional heritage and learning related activities are limited by the lack of amenities within the complex and the poor condition of the buildings. This also impacts the income generating capability. Refurbishment and renovation of the buildings will prevent any further deterioration and restore a major asset, enabling the complex to become a community asset. It will be used for a variety of activities that will involve the local and wider communities through educational, community and commercial uses. As well as increasing community use the Barn has the potential to become a visitor destination, thus raising the profile of the area. This will also allow the Barn to become economically self-sufficient as it currently requires significant funding and upkeep from the local authority to maintain it. With imminent cuts in government funding, this support cannot be guaranteed indefinitely, and there is an urgent need to ensure that the complex has the capability to generate sufficient income to assure its future. Similarly the authority has currently allocated match cash funding of £200K to support refurbishment, but this cannot be guaranteed indefinitely. With the current and anticipated funding climate, not only could the local authority funding of £200K be lost, if left too long it would be harder for the Trust to raise its contribution.

Without a secure future the building will not be properly maintained with the result that it could become unsafe. The alternative would be to sell the complex to a private developer. Either way the public would no longer have access to an iconic building.

Completion of the project will contribute greatly to reduce the shortage of community space in the area whilst

preserving an historic monument. It will facilitate more educational and heritage activities, as well as increasing potential income generating events.

Major refurbishment of all the buildings will reduce future maintenance and repair costs and help long term sustainability of the Trust and the complex.

3d Why do you need Lottery funding?

Previous improvements and renovations have been completed with the support of one-off grants and fund raising activities as they became available. The Trust and Local Authority have undertaken projects with a cost of £78K since 2010 to improve facilities and ensure integrity of the buildings and health and safety of visitors. However the income generating capacity of the site is currently greatly limited, and the funding required to achieve the necessary improvements to the complex is in excess of the current funding sources. SGC are not able to continue funding indefinitely and the capability for income generation is required to retain the complex for community use as well as maintaining this historic building in the long term.

Funding is also required to carry out Market and Audience Research, and provide support for the development of a detailed Activity Plan. In addition the complex will be enhanced by interpretation and educational facilities.

3e What work and/or consultation have you undertaken to prepare for this project and why?

A number of surveys and studies have been completed:

- In July 2013 a survey was organised to assess and gain thoughts on the type of activities and events that would encourage people to use the facilities and attract visitors to the site. This was accompanied by a series of open meetings. The results indicate potential for the complex to become a community hub and provide events of interest to the local community. A copy of the report is contained in WMB5A.
- A survey into the potential for educational opportunities. A detailed study was carried out which identified how the history of the barn fitted into the national curriculum. It also set out a series of potential “lesson plans” for various levels. A copy of the report is contained in WMB5B.
- A Condition Survey of the complex was completed in March 2014. This identified the areas where the complex was already in poor condition, and where there was potential for degradation in the near future. A copy of the report is contained in WMB7.
- A number of organisations have written letters of support for the refurbishment.
 - English Heritage consider the Barn to be an exceptional survival of national importance and welcome the broad aspiration to repair and reuse these buildings, and provide a sustainable and viable use for the site as a whole.
 - The Architectural Heritage Fund believe that “Winterbourne Medieval Barn is a highly significant building and the Trust is to be applauded for its vision in attempting to find viable uses for the site as well as involving the local community as fully as possible. The close working relationship between the Trust and South Gloucestershire Council is also important, and reflects well on both parties, helping to ensure that this project, in its very rural location, can be sustainable. The Trust has recognised that financial viability is key to any successful business plan and its ideas for the use of the various outbuildings on the site are imaginative and practical – a combination we do not always see in the business plans we review at the AHF. On behalf of the AHF we hope therefore that the HLF are able to support this Stage 1 application. “
 - Other organisations and societies have also written in support. Copies of all letters are contained in WMBT10. Although these letters were submitted for an earlier HLF submission, the project has not changed in scope, and support is still in place for the proposal now to be considered.
- A Business Plan has been produced to demonstrate the potential for the complex to become self sufficient. This shows the increased activities as well as potential income from third party lettings for weddings, family parties and conferences. A copy of the Business Plan is attached as WMB2 and the detailed financial analysis is contained in WMB2A.
 - In support of the Business Plan a review has been carried out of similar facilities. This has demonstrated that there is a demand for hire of iconic buildings such as the Barn, and provides confidence that the Business Plan is realistic.
 - Completion of the project will require WMBT to achieve significant match funding. An initial review of potential grant funders has been completed - see WMB6.

Section four: Project outcomes

In this section, tell us about the difference that your project will make for heritage, people and communities.

4a What difference will your project make for heritage?

The complex will be better managed and preserved in that the income generating capacity will have increased and will support the ongoing maintenance and support of the complex, which currently relies on significant financial support from the local authority and grants. A Business Plan has been produced to support the development which indicates a decreasing reliance on local authority support, whilst ensuring that there are sufficient funds to maintain the asset going forward for the benefit of the community. Improvement of the available amenities will enable the complex to be hired out to third parties to generate sufficient income to cover annual costs and generate appropriate reserves to cover future maintenance costs. Review of similar facilities demonstrate a continuing demand for hire of iconic buildings such as Winterbourne Barn for community occasions such as weddings, family parties and conferences. There is also a high demand in the vicinity for suitable meeting and conference space. Usage in this way will mean more people are able to view the heritage and hence raise its profile.

There will be improved information available for visitors on the history and role of the asset. The project will include development of appropriate Interpretation facilities. The Barn is situated in a Conservation Area adjacent to a 12th Century Church. The area is rich in history – it is situated on a pilgrim trail and was the centre for a significant Hatters industry. The Trust has considerable knowledge about the complex, its founder and the area and this is an opportunity to promulgate that knowledge to a wider audience. This will involve development of Interpretation panels on the history of the barn and surrounding area, as well as production of educational material and other information for visitors and users of the site. The project will also consider other interpretation methods, eg telephone app, website development. Preliminary discussion have been held with a number of specialist interpretation organisations and these have indicated a wide range of potential forms that will be considered. Current proposals include provision of up to 14 Information Boards on the history of the complex, its architecture and the surrounding area. Guides and leaflets to inform and assist visitors will be produced along with appropriate educational resources.

The heritage will be in better condition post refurbishment - currently there are significant elements of the complex which are in a very poor state of repair and not suitable for public access. This project will restore and renovate the buildings to their former glory and facilitate greater access to the complex. The elements in poor condition detract from the overall appearance of the asset and restrict the usage of the site. It does not reflect the building as it was originally built and conceived.

4b What difference will your project make for people?

People will have developed skills in various ways

- The project will provide opportunities for the local community members and volunteers of the Trust to gain skills that will help them to ensure that the complex is better looked after and managed. They will also be opportunities to gain experience of completing major projects and understanding of the various factors that need to be taken into account in developing a heritage asset. This knowledge will be of value to other organisations. The project includes the appointment of consultants to support market research and activity development. These will work with existing volunteers who have extensive local knowledge, to provide both relevant information to support development of the project, and ongoing expertise after completion.
- Completion of the project will provide facilities that can be used to deliver training and learning opportunities for people from far and wide. The complex will be available as a centre for rural crafts and other agricultural and horticultural activities. Some workshops have previously been held on Basket Weaving and Dry Stone walling, and the response to these demonstrates that a demand for more. On completion of the physical works the Activity Plan produced during the Development phase, along with the Market and Audience Research, will be used to develop and organise an appropriate range of activities. Cultural and craft events to be introduced will be set in a historical context. In addition there will be opportunities for therapeutic gardening for disabled people, people with learning difficulties for example. There is an existing kitchen garden, maintained by volunteers, and there is the opportunity to extend access to this.
- Volunteers will have greater opportunities to develop and extend their skills through an enhanced range of learning activities. There will be a need to expand the type of activities on offer, along with the need to market

the activities. Currently the Trust has ~50 volunteers who play a major role in planning and managing activities. Many of these have potential for developing additional skills, and such opportunities will be available to these and new volunteers. The project and Business Plan indicate that paid resources will be employed to support the increased range of activities, and this will enable the current and future volunteers to expand their activities in new ways.

- There will be a greater need and opportunities for volunteers, who will be able to gain the benefit of training and improved knowledge of the asset. They will benefit opportunities of meeting new people and enjoy improved quality of life.

People will learn about heritage as a result of their visit due enhanced interpretation and additional activities at this significant heritage site. The complex will be able to welcome greater numbers of visitors as a result of the development. The Interpretation proposals will enhance the understanding of those visiting in terms of the history of the complex and its role in the wider landscape. The complex is close to a large urban area (Bristol) where there are limited opportunities to learn about the agricultural/horticultural heritage of the area, and the proposed development will provide a centre for a significant population. There is a population in excess of 262,000 within a 20 minute drive and the complex is located close to the M32/M4 Motorways and Bristol Parkway Station making it accessible to a much wider community. Expansion of the range and number of events and activities will provide additional opportunities for this population to visit the complex. Additional events and activities could include an increased range of craft workshops operated throughout the year as well as opportunities for additional visits from bodies such as local history and vernacular architectural societies.

The refurbished complex will be available to provide facilities to improve community cohesion. In a recent public consultation, a number of potential uses were identified, including a craft/agricultural centre and a meeting point for local interest groups. In this way the complex will continue in the role it has played in the local community for centuries.

The facilities will be available for hire to groups and individuals. In addition to improving the financial viability of the complex, it will increase the number of visitors to an iconic building.

4c What difference will your project make for communities?

The local area will be a better place to visit as a result of improving the appearance of the complex and there will be greater opportunities for the local community to get involved with, and enjoy the facilities.

The attraction of visitors to the area will also enhance local businesses, thus benefiting the community. The Trust currently holds events which are well supported by the local community, but there is potential for wider involvement and greater participation. There are large and diverse communities in the area and many people within them are not currently aware of the barn complex. Enhancing the range of activities will provide opportunities to reach wider areas. The local economy will be boosted by the additional events/activities that can be held, the introduction of corporate and community facilities and employment of paid administrative support .

The provision of rural/ social enterprise units will boost the local economy as well as providing a potential visitor attraction. They will also support the financial resilience of the complex.

The complex is close to the M4/M32 junction and Bristol Parkway station thus increasing the potential for visitors. The local community will have a focal point for events and activities, and could become a centre for the area.

The Complex is close to Winterbourne, Bradley Stoke and Frampton Cottrell which are significant and diverse population centres. It is ideally situated to welcome these communities and improve community cohesion. Whereas Winterbourne and Frampton Cottrell are established communities, Bradley Stoke is a relatively new development and there is an opportunity to provide greater integration between these three areas. The enhanced facilities will enable greater engagement of the wider combined community and will provide an ideal venue for learning about rural crafts and knowledge of the history of the area and farming methods. It will also serve as a meeting and activity centre for the local and wider communities. These aspects will be developed further in the Activity Plan.

4d What are the main groups of people that will benefit from your project?

The project will benefit all groups of people

- Members of the local community who will attend the additional activities
- South Gloucestershire and Bristol residents. There is a population of over 262,000 within a 20 minute drive of the Barn
- Educational establishments and other groups from both the local area and wider afield who will have access to an iconic heritage asset
- Visitors to the area who will be able to visit the complex. It is located close to the M4/M32 junction and Bristol Parkway Station (5 minute taxi ride) thereby increasing the number of potential visitors
- Disabled groups who will have access to horticultural facilities
- Current and new volunteers who will have opportunities to learn new skills and get involved in new activities
- Local craftsmen and farmers

4e Does your project involve heritage that attracts visitors?

Yes

What are your existing visitor numbers?

3500

How many visitors a year do you expect on completion of your project?

15000

4f How many people will be trained as part of your project, if applicable?

40

4g How many volunteers do you expect will contribute personally to your project?

40

4h How many full-time equivalent posts will you create to deliver your project?

1

Section five: Project management

In this section, tell us how you will develop and deliver your project.

Development phase**5a What work will you do during the development phase of your project?**

The project will be co-ordinated by a Project Manager to be appointed after the award of Part 1 Funding. The Project Manager will co-ordinate the various consultants carrying out the activities listed below. The Project Manager will also liaise with South Gloucestershire Council and Winterbourne Medieval Barn Trust to ensure that the Development proposals to be included in the Part 2 Submission reflect the needs of both parties. On approval of Part 1 Funding, a Project Board will be formed, chaired by South Gloucestershire Council, with WMBT Trustees as members. The Project Manager will be responsible for the day to day management of the project with the Project Board monitoring and reviewing progress. Detailed briefs for the Project Manager and other consultants are included Supporting Information WMB9.

The detailed activities to be covered are:

Preparation of detailed architectural drawings

Preparation of detailed cost plan

Completion of ecological site surveys

Management of Construction (Design and Management) Regulations

Completion of topographical and ground water drainage survey

Completion of Market and Audience Research

Preparation of Activity Plan

Preparation of Interpretation proposals

Collation of historical and architectural information to support Interpretation proposals
Development of the Business Plan in line with Activity Plan and Market Research outputs
Development of contacts with local educational establishments and organisations

Training of volunteers and Trustees

Acquisition of outstanding match funding

Listed Building and Planning approval

5b Who are the main people responsible for the work during the development phase of your project?

Appointed project manager

Architects and their team

Project Board

Market Research Consultant

Activity Development Manager

Interpretation Consultant

Funding Manager

5c Complete a detailed timetable for the development phase of your project. Use the 'add item' button to enter additional rows.**Development activities**

Task	Start month	Start year	End month	End year	Who will lead this task
HLF Consideration of Part 1 submission	November	2015	March	2016	HLF
Appoint Project Manager	May	2016	June	2016	SGC
Appoint Conservation Architect	July	2016	September	2016	Project Manager
Develop Funding Plan	July	2016	September	2017	Project Manager
Management and Maintenance Plan	August	2016	September	2017	Project Manager
Carry out Market Research	August	2016	September	2017	Market Research Consultant
Develop Activity Plan	August	2016	September	2017	Project Manager
Develop Interpretation Proposals	August	2016	September	2017	Project Manager
Development of Refurbishment Proposals	October	2016	March	2017	Project Manager
Review detailed plans and costs	April	2017	May	2017	Project Manager
Apply for Listed Building and Planning Consent	May	2017	October	2017	Project Manager
Produce Part 2 HLF Submission	May	2017	October	2017	Project Manager

5d Tell us about the risks to the development phase of your project and how they will be managed. Use the 'add item' button to enter additional rows.

Development risks

Risk	Likelihood	Impact	Mitigation	Who will lead this
Surveys identify issues that result in significant changes to the plan	Low	Medium	Condition survey has been completed and findings incorporated into current proposals. Subsequent findings will be included in review of detailed Implementation proposals	Project Manager
Market research survey does not confirm anticipated activity levels	Low	High	Some research already completed. Proposals within Development phase for Market Research will seek to confirm potential and/or identify alternative or additional opportunities	Project Manager
Ecology Study identifies protected species within the complex which prevent development	Low	Medium	There are no known issues within the existing buildings and there is limited potential for "surprises". Any findings will need to be incorporated as part of the detailed implementati	Project Manager
Insufficient funding for Development work	Medium	High	The estimates have been based on advice from appropriate consultants. These are considered to be conservative and inflation and contingency have been added on. Any shortfall will need to be resolved either by careful management of development activities or by identifying alternative sources of funding	Project Manager in conjunction with Project Board

Delivery phase

5e Who are the main people responsible for the work during the delivery phase of your project?

As with the Development phase the project will be co-ordinated by a Project Manager. The brief for the Project Manager is shown in Supporting Information WMB9. This will provide continuity throughout the project. The Project Manager will work with the Project Board to ensure that the overall aims of the project are achieved. On approval of Part 2 Funding the composition of the Project Board will be reviewed to ensure that it still has the appropriate skills.

The key staff/consultants will be:

Project Manager
 Conservation Architects
 Heritage building specialists
 Interpretation Consultants
 Activity Development Manager

5f Complete a summary timetable for the delivery phase of your project. Use the 'add item' button to enter additional rows.

Delivery activities					
Task	Start month	Start year	End month	End year	Who will lead this task
Appoint Conservation Architects	April	2018	June	2018	Project Board
Appoint Heritage Building Specialists	June	2018	September	2018	Project Board
Appoint Interpretation Consultants	June	2018	September	2018	Project Manager
Carry out building refurbishment	October	2018	September	2019	Project Manager
Develop Interpretation facilities	October	2018	September	2019	Interpretation Consultant
Produce Educational material	October	2018	September	2019	Interpretation Consultant
Implement Activity Plan	March	2019	March	2021	WMBT/ Activity Development Manager

5g Tell us about the risks to the delivery phase of your project and how they will be managed. Use the 'add item' button to enter additional rows.

Delivery risks

Risk	Likelihood	Impact	Mitigation	Who will lead this
Costs of project increase during detailed design	Medium	High	QS cost review and value engineering by Project Manager	Project Manager
General programme delays/abortive work	Medium	High	Appointment of Project Manager, regular cost and progress reporting and review	Project Manager
Tender figures higher than QS estimates	Medium	Medium	10% inflation included in QS estimates. Change control procedure (additional work above agreed value to be referred to Project Board for approval)	Project Manager
Additional work being found desirable during contract	Low	Low	Change control procedure (non-essential work to be referred to Project Board for approval)	Project Manager
Inclement weather and similar delays to contract	Medium	Medium	Contingency included in QS estimates Contingency allowance in overall programme	Project Manager
Delay resulting from finding bat roost	Low	Low	Previous bat surveys to be reviewed prior to start of construction. Buildings to be refurbished are in use and there are no signs of flying rodents	Project Manager
Accident and injury to workforce during contract	Low	Low	Ensure principal Contractor follows CDM Regulations and has appropriate competences and insurances	Project Manager
Loss of goodwill from existing visitors due to cancellation of annual events during building work	Low	Medium	Provide adequate information and updates to provide news of project progress. Potential for holding events at alternative sites to be considered	WMBT
Loss of goodwill from neighbours	Medium	Low	Provide adequate information and consultation about project via regular updates	WMBT
Loss of volunteers due to disruption of normal activities	Low	Medium	Involve volunteers in other activities to develop their skills and maintain links with the complex, and also training. The Trust will also seek to retain the skills by holding events at other venues during the construction period	WMBT

5h When do you expect the delivery phase of your project to start and finish?

Project start date

Month

March

Year

2018

Project finish date

Month	March	Year	2021
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Section six: After the project ends

In this section, tell us about what will happen once your project has been completed.

6a How will you maintain the outcomes of your project after the grant ends and meet any additional running costs?

Completion of the overall project will enable the Trust to organise additional activities within the complex which will enable it to be maintained and supported out of the income generated. The additional income should be sufficient to meet the anticipated additional running costs. The Business Plan contains provision for a paid site manager and associated support to organise the activities and market the site.

South Gloucestershire Council will continue to provide financial support until the proposed income streams have been fully developed and implemented. As has been the case in similar projects in the area, the leasing of the complex to the Trust will take place when there is confidence that the required income streams are sustainable. The draft Activity Plan assumes that external support will be provided during the Development and Delivery phases, working with local volunteers and this knowledge will be used to further develop activities following completion of refurbishment. Similarly the Market Research carried out during the Development Phase will provide guidance on potential opportunities.

6b Tell us about the main risks facing the project after it has been completed and how they will be managed.**After project risks**

Risk	Likelihood	Impact	Mitigation	Risk Owner
Revenue falls below the plan levels	Low	High	The business plan for the overall project, as enhanced by the marketing plan, assumes multi income streams and contains. South Gloucestershire Council will provide financial support until the revenue can be built up to plan levels	WMBT
Property maintenance liability is higher than anticipated	Low	High	Post completion the buildings will be in a good condition. The business plan includes assumes development of reserves to provide for future costs.	WMBT
The significant increase and diversity in site activity cannot be managed with the planned resources	Low	High	The business development/ admin staff will monitor this closely under the oversight of trustees to ensure that appropriate resources are available	WMBT

6c How will you evaluate the success of your project from the beginning and share the learning?

The Trust currently monitors attendance at the various events and this will be maintained to demonstrate the impact of improved facilities.

Learning and community work The Trust will monitor the number of schools involved, the number of pupils involved and the number of volunteers trained.

Qualitative evaluation - the Trust will undertake qualitative monitoring of users and events, so that it can respond to comments about the facilities and events.

Improved accountability of Trust for the overall management of the asset following issue of a lease by South Gloucestershire Council. The WMBT has received advice from other charities in preparation of this submission and will seek to promulgate that advice to interested charities and other bodies going forward. Preparation of the detailed Activity Plan during the project will identify potential areas for future events and development. It will also provide a methodology for measuring success going forward.

Section seven: Project costs

In this section, tell us how much it will cost to develop and deliver your project.

There is a limit of 20 words per 'description' section when completing the cost tables. A more detailed explanation and breakdown of your costs should be provided as part of your supporting documentation. Please see Section nine: Supporting documents within the programme application guidance for further information.

7a Development-phase costs

Development costs

Cost heading	Description	Cost	VAT	Total
Professional Fees	Development of detailed proposals and supporting studies - split Architect £38,237, CDM Co-ordinator £533, Quantity Surveyors £4,799, Structural Engineers £5,834, Building Services Consultant £10,154, Highways Consultant £7,465, Ecologist £2,133 and Measured Survey, £3,306	72461		72461
New staff costs	Project Manager	50000		50000
Recruitment				
Other costs (development-phase)	Market research to confirm achievability of Business Plan (£15,000), development of Interpretation Proposals (£15,000) and development of Activity Plan (£15,000), Funding Manager (£20,000), Conservation Plan preparation support (£4,000), Management and Maintenance Plan Support (£3,000), and Evaluation Plan Support (£3,000)	75000		75000
Full Cost Recovery				
Contingency	5% of estimated professional fees for development work	3139		3139
Non-cash contributions				
Volunteer time	Trustee time in development of the bid including visits/research to support development of Activity Plan	35000		35000
Total		235600		235600

7b Development-phase income

Please note that HLF rounds all grant requests down to the nearest £100. With this in mind, please make sure that the total Development-phase income exactly matches the total of your Development-phase costs or the system will not allow you to proceed.

Development income			
Source of funding	Description	Secured?	Value
Local Authority	SGC Contribution	Yes	35000
Other public sector			
Central government			
European Union			
Private donation - Individual			
Private donation - Trusts/Charities/Foundations			
Private donation - corporate			
Commercial/business			
Own reserves			
Other fundraising			
Non-cash contributions			
Volunteer time	WMBT Resources	Yes	35000
HLF grant request			165600
Total			235600

7c Development-phase financial summary

Total development costs	235600
Total development income	70000
HLF development grant request	165600
HLF development grant %	70

Section seven: Project costs

7d Delivery-phase capital costs

Cost Heading	Description	Cost	VAT	Total
Purchase price of items or property				
Repair and conservation work	External Conservation Contractor (excluding Contingency)	920347		920347
New building work				
Other capital work				
Equipment and materials (capital)				
Other costs (capital)	Project Manager	50000		50000
Professional fees relating to any of the above (capital)	Ongoing design and specialist support - Architect £55,221, CDM Co-ordinator £2,301, Quantity Surveyor £20,708 Structural Engineer £9,203, Building Services Consultant £14,726 and Highways/Traffic Consultant £9,203	111362		111362
Total		1081709		1081709

Section seven: Project costs

7e Delivery-phase activity costs

Cost Heading	Description	Cost	VAT	Total
New staff costs	Activity Plan Development Manager	35000		35000
Training for staff				
Paid training placements				
Training for volunteers	Provision of miscellaneous training	6000		6000
Travel for staff	SGC Travel Costs	5000		5000
Travel and expenses for volunteers	WMBT Travel Costs (including visits/research to support Activity Plan development)	5000		5000
Equipment and materials (activity)	Additional requirements for equipment and materials	3000		3000
Other costs (activity)	Interpretation Development (including educational materials for schools)	50000		50000
Professional fees relating to any of the above (activity)	Evaluation Plan Support	3000		3000
Total		107000		107000

7f Delivery-phase - other costs

Cost Heading	Description	Cost	VAT	Total
Recruitment				
Publicity and promotion				
Evaluation				
Other costs				
Full Cost Recovery				
Contingency	Includes 10% Construction Contingency plus general allowance	115359		115359
Inflation	Allowance from date of cost estimate to anticipated delivery date	153349		153349
Increased management and maintenance costs (maximum five years)	Additional running costs to support additional activities	185707		185707
Non-cash contributions				
Volunteer time	WMBT Resources	35000		35000
Total		489415		489415

Section seven: Project costs

7g Delivery Phase income

Please note that HLF rounds all grant requests down to the nearest £100. With this in mind, please make sure that the total Delivery-phase income exactly matches the total of your Delivery-phase costs or the system will not allow you to proceed.

Source of funding	Description	Secured?	Value
Local authority	SGC Contribution (including staff T&S)	Yes	170000
Other public sector			
Central government			
European Union			
Private donation - Individual			
Private donation - Trusts/Charities/Foundations			
Private donation - corporate Commercial/business			
Own reserves	Miscellaneous Equipment and Materials	Yes	3000
Other fundraising	Additional fundraising to be secured during Development phase supported by Funding Manager	No	400017
Increased management and maintenance Costs (maximum five years)	Additional running costs to support increased activities - 5 year forecast. Costs will be managed as activity levels increase to support the revised values	No	185707
Non-cash contributions			
Volunteer time	WMBT Support (including Volunteer T&S)	No	40000
HLF grant request			879400
Total			1678124

7h Delivery-phase financial summary

Total delivery costs	1678124
Total delivery income	798724
HLF delivery grant request	879400
HLF delivery grant %	52

7i If cash contributions from other sources are not yet secured, how do you expect to secure these and by when?

The project assumes that £600,000 of additional funding will be required in addition to the HLF bid. £200,000 has been pledged by SGC. The remaining £400,000 will be provided by grant applications, corporate partnerships, major donors and local fundraising. .

The bid includes provision for a Funding Manager to co-ordinate the process, working with WMBT Trustees. An initial list of potential grant funders has been identified (WMB6). These would form the initial target during the Development phase, along with other sources mentioned above. Any shortfall would then be covered by identification of other sources as well as other fundraising opportunities. This would be supported by a Funding Manager. In the past 4 years WMBT has raised£52,000 to undertake site improvements and has already raised £39,000 towards educational projects and Enterprise Unit development

7j If you have included Full Cost Recovery, how have you worked out the share that relates to your project?

Section eight: Additional information and declaration

This part of the form aims to collect the information we need to report on the range of organisations we fund. We will not use this information to assess your application. We encourage you to be as specific as possible about the people your organisation represents.

If your organisation represents the interests of a particular group, such as young people or disabled people, tell us which by filling in the tables below.

If you are based in Northern Ireland, where legislation requires us to report in detail on the organisations we fund, please complete the tables in full, as applicable.

If you are based outside Northern Ireland and your organisation represents the interests of a wide range of people and not any particular group, mark this box only.

Age

People with disabilities (physical or mental problems which have a significant and long-term negative effects on a person's ability to carry out normal day-to-day activities)

Ethnicity

Marital Status

People with dependants (for example, children or elderly relatives)

People living in households with incomes below the national average, or people living in the most deprived local-authority wards in England, Scotland, Wales or Northern Ireland.

Political opinion (Northern Ireland only)

Religious belief

Gender

Sexual orientation

Declaration

a) Terms of Grant

You must read the standard terms of grant for this programme on our website.

By completing this Declaration, you are confirming that your organisation accepts these terms. For partnership projects, all partners must confirm that they accept the standard terms of grant by adding a contact at the end of the declaration.

b) Freedom of Information and Data Protection

We are committed to being as open as possible. This includes being clear about how we assess and make decisions on our grants and how we will use your application form and other documents you give us. As a public organisation we have to follow the Data Protection Act 1998 and the Freedom of Information Act 2000.

When you complete the Declaration at the end of the application form, you are confirming that you understand the Heritage Lottery Fund's legal responsibilities under the Data Protection Act 1998 and the Freedom of Information Act 2000 and have no objection to us releasing sections 2, 3 and 4 of the application form to anyone who asks to see them. If there is any information in these sections of the form that you don't want made publicly available, please explain your reasons below:

We will take these into account when we respond to any request for access to those sections. We may also be asked to release other information contained elsewhere in the form and we will respond to these requests after taking account of your rights and expectations under the Freedom of Information Act 2000 and Data Protection Act 1998. In those cases, we will always consult you first. The Heritage Lottery Fund will not be responsible for any loss or damage you suffer as a result of HLF meeting these responsibilities.

When you complete the Declaration you also agree that we will use this application form and the other information you give us, including any personal information covered by the Data Protection Act 1998, for the following purposes:

- **To decide whether to give you a grant.**
- **To provide copies to other individuals or organisations who are helping us to assess, monitor and evaluate grants.**
- **To hold in a database and use for statistical purposes.**
- **If we offer you a grant, we will publish information about you relating to the activity we have funded, including the amount of the grant and the activity it was for. This information may appear in our press releases, in our print and online publications, and in the publications or websites of relevant Government departments and any partner organisations who have funded the activity with us.**
- **If we offer you a grant, you will support our work to demonstrate the value of heritage by contributing (when asked) to publicity activities during the period we provide funding for and participating in activities to share learning, for which we may put other grantees in contact with you.**

We may contact you from time to time to keep you informed about the work of the Heritage Lottery Fund

Tick this box if you do not wish to be kept informed of our work

I confirm that the organisation named on this application has given me the authority to complete this application on its behalf.

I confirm that the activity in the application falls within the purposes and legal powers of the organisation.

I confirm that the organisation has the power to accept and pay back the grant.

I confirm that if the organisation receives a grant, we will keep to the standard terms of grant, and any further terms or conditions as set out in the grant notification letter, or in any contract prepared specifically for the project.

I confirm that, as far as I know, the information in this application is true and correct.

I confirm that I agree with the **above statements.**

Name	George Kousouros
Organisation	South Gloucestershire Council
Position	Community Enterprise Officer
Date	30/11/2015

Are you applying on behalf of a partnership?
No

Section nine: Supporting documents

Please provide all of the documents listed at each round, unless they are not applicable to your project. You will be asked to indicate how you are sending these documents to us - as hard copy or electronically.

In addition to numbers 1-8 below, you may also be required to submit further supporting documents that are specific to the programme that you are applying under. For further guidance, please refer to the application guidance Part four: Application form help notes. We will not be able to assess your application if we do not receive all the required information.

First round

1. Copy of your organisation's constitution (formal rules), unless you are a public organisation. If your application is on behalf of a partnership or consortium, please refer to the programme application guidance for more information on what you need to provide.

If you have sent a copy of your constitution with a previous grant application (since April 2008) and no changes have been made to it, you do not need to send it again. Tell us the reference number of the previous application.

N/A

2. Copies of your agreements with project partners, signed by everyone involved, setting out how the project will be managed (if applicable);

Not applicable

3. Copy of your organisation's accounts for the last financial year. This does not apply to public organisations;

Not applicable

4. Spreadsheet detailing the cost breakdown in Section seven: project costs;

Electronic

5. Calculation of Full Cost Recovery included in your development phases costs (if applicable);

Not applicable

6. Briefs for development work for internal and externally commissioned work;

Electronic

7. Job descriptions for new posts to be filled during the development phase;

Electronic

8. A small selection of images that help illustrate your project. If your project involves physical heritage, please provide a selection of photographs, a location map and, if applicable, a simple site map or plan. It would be helpful if these are in digital format (either as an attachment or on disk). We will use these images to present your project to decision-makers.

Electronic

If applicable, please attach any additional documents as required for the programme that you are applying under. Use the box below to confirm in what format the additional documentation will be submitted.

Electronic

Please now attach any supporting documents.

When you have completed the form click the submit button to submit the form to the server. You can view what you have entered by clicking the draft print button above.