

Evaluation, Economic and Social Impact Consultant

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



**Invitation to Tender (ITT)
for
St Osyth Priory and Parish Trust
Evaluation, Economic and Social Impact Consultant**

Submission of Tenders: 13th August 2025

Development Phase Budget: £25,000

Delivery Phase Budget: £35,000 (Subject to successful funding)

Any queries relating to this tender should be submitted via

tenders@stosythpriorytrust.org.uk

Issue date: 24th 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 project funded by a grant from The National Lottery Heritage Fund which will focus on the redevelopment of the Tithe Barn and Old Dairy into hireable event and community spaces.

St. Osyth Priory and Parish Trust wishes to appoint a suitably qualified and highly experienced Evaluation, Economic and Social Impact Consultant to work on the Development and Delivery Phases - RIBA 1 to RIBA 7 of this aspect of the project. This is a Heritage Enterprise project, and evaluation needs to encompass the needs of this grant programme.

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 as this is subject to successful funding, and bidders should take account of this.

Development Phase Budget: £25,000

Delivery Phase Budget: £35,000 (Subject to successful funding)

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 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 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

Procurement of Contractor – June 2027 to November 2027

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 EVALUATION, ECONOMIC AND SOCIAL IMPACT CONSULTANT

2.1.1 Role, Scope and Responsibilities

The Evaluation, Economic and Social Impact Consultant will be required to work with the Project Team to co-ordinate the evaluation of all aspects of the project and write the final Evaluation plan in line with The National Lottery Heritage Fund guidelines. Helping us to improve as we progress will be as important as compiling the final report. We will expect the evaluation consultant to work closely with us during the life of the project.

The consultant will be tasked with capturing data related to Economic and Social Impact. We would also like the project's framework to be consistent with HM Treasury's 'Green Book', 'Magenta Book' and The National Lottery Heritage Fund good practice guidance.

This work will be split into two phases:

- Development Phase:
 - preparation of an evaluation framework
 - evaluation of the Development Phase
- Delivery Phase:
 - Evaluation of the Delivery Phase

The final report should contain detailed recommendations for the legacy of the project.

The Consultant will:

- Compile a detailed evaluation framework which identifies benchmark data and those outputs and outcomes that are expected with delivery of each activity.
 - The framework will set out the key performance indicators (and associated quality indicators) expected from delivering each of the activities identified within the Activity Plan and other appropriate plans, as well as identifying the timeline when critical outcomes are expected.
 - The framework should be mindful of the requirements of The National Lottery Heritage Fund and their expectations in relation to outputs that have been committed to be delivered within this funded project.
 - The framework will detail the frequency with which monitoring will be carried out and will identify the most effective manner in which it should be carried out with specific audiences.
 - Within the framework, develop a mechanism by which the results gleaned from the monitoring activity can be reviewed, collated and interpreted. This will inform an action plan identifying all steps necessary to enhance the future programme development and delivery.
- Design a toolkit that staff and volunteers will use to collect the evaluation data.
- Train staff and volunteers in the principles and techniques of evaluation and how to use the toolkit.
- Provide support to staff and volunteers throughout the Delivery Phase and facilitate reflection amongst the internal team.

The framework should support:

- Quarterly progress monitoring
- Impact data production after one year showing the community impact of the fund including:
 - Improved community asset usage
 - Support for businesses and community organisations
 - Job and volunteering opportunity creation
 - Service delivery
 - Access improvements
 - Project contributions to the national evaluation of National Lottery Heritage Fund
 - Capture and use of lessons learnt
 - 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:
 - Collaborative research tool design
 - Visitor / participant Surveys
 - Participant and Volunteer Interviews
 - Partnership and Stakeholders Surveys with all organisations and community/volunteer groups engaged in the project
 - Delivery Staff Interviews and Workshops
 - 360° Case Studies
 - Site Visits by the evaluation team

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

- Increased usage of heritage assets and associated services and activities on site - measured by activity attendance, footfall and community group use.
- Participant and volunteer reported levels of increased local participation in community life, arts and culture, including additional volunteering activity.
- 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.
- Additional economic impact outcomes including:
 - Jobs saved and/or created
 - Volunteering opportunities sustained or created

2.2 SCHEDULE OF SERVICES

2.2.1 Development Phase

Maximum Contract Value - £25,000 excluding VAT, including expenses

The following services are expected:

- Review of project documentation.
- Collating baseline data from secondary sources and from Development Phase when a range of consultation mechanisms for the project will be undertaken as part of the design development.
- Support with audience mapping as required.
- Provide a full draft evaluation framework for the Development Phase Review with The National Lottery Heritage Fund and then update following feedback.
- Developing a robust evaluation framework to accompany The National Lottery Heritage Fund Delivery Phase application working.
- Contributing relevant information regarding evaluation into The National Lottery Heritage Fund Delivery Phase application.
- Evaluating the Development Phase and submitting a report that meets The National Lottery Heritage Fund requirements that can be submitted with the Development Phase completion report.
- Interviews with key personnel.
- Forming the project evaluation framework.
- Use and development of evaluative tools.
- Support the development of evaluation for Pilot Activities and consultation.
- Training of volunteers to capture evaluation data during Pilot Activities and consultation.
- Baselining - primary research and desktop for evaluation and formation of Economic Impact and Social Impact Assessment.
- Evaluation of the Development Phase and interim report as part of Development Phase Close Out.
- Attend meetings both online and in person as required.

There will be a break clause between the Development Phase and Delivery Phase.

2.2.2 Delivery Phase

Maximum Contract Value – £35,000 excluding VAT, including expenses

The following services are expected:

RIBA Stages 4 to 7

- Developing, piloting and refining evaluation tools that any staff or volunteers can use to evaluate any activities, events and the volunteering experience to learn lessons and feed back into future activities.
- Evaluate programmes with partners.

- Work with St Osyth's team to collate data on visit patterns, volumes, demographic etc.
- Set up and implement a framework to evaluate digital engagement.
- A series of qualitative interviews with members of the Project Board and Project Team, including Design team, consultant and staff involved in the capital restoration to feed into interim report.
- Managing training sessions with St Osyth staff and volunteers on using evaluation tools effectively and managing data.
- Assist the Project Manager and St Osyths with the collection of information on activities, volunteering, training, formal and informal learning, which can be used in preparing The National Lottery Heritage Fund quarterly reports.
- Prepare annual interim evaluation reports of the Project.
- Prepare a final compliant evaluation report of the Project, under the direction of St Osyths that focused on the extent to which the project met its intended outcomes for inclusion, skills, wellbeing, the local area, economy and organisational resilience. The report should provide a narrative of the story of change, what went well, what went less well and lessons learnt for the future of the Trust, other similar projects and The National Lottery Heritage Fund itself.

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@stosythprioritytrust.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.
- 3.1.7 This ITT does not constitute an offer and St Osyth Priory & Parish Trust does not undertake to accept any tender. St Osyth Priory and Parish Trust reserves the right to accept a Tender in part, rather than in full.
- 3.1.8 Whilst the information contained in this ITT is believed to be correct at the time of issue neither St. Osyth Priory and 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 and 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 & 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 and 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 Evaluation, Economic and Social Impact consultant will also be commissioned for works in the Delivery Phase. **There is, however, no guarantee that Delivery Phase 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@stosythpriorytrust.org.uk

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 and 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. This opportunity for clarifications exists until the deadline of Friday 1st August after which no undertaking is given to reply. St Osyth Priory and 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 and 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 and Parish Trust, the clarification is not confidential, St Osyth Priory and 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%		
	3 x Case Studies demonstrating relevant experience	30%
	Key Project Personnel	20%
	Project Execution including social value	20%
Price - 30%		
	Cost Proposals	30%

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.

- **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.

- **Key Project Personnel.** Please provide Bios and CVs of your proposed team. 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.
- **Methodology and Timeline.** In addition, please provide a methodology, timeline and order of outputs. Tell us how you would propose delivering against the brief, and why. Within your methodology, please tell us how you would engage stakeholders as St Osyth Priory and Parish Trust is an organisation that works with, and across, a number of varied stakeholders. Also within your methodology, please set out any social value that you will deliver as part of this work.
- **References.** Please provide three referees' details and a description of similar contracts delivered over the past five years
- **Insurance.** Please confirm that you have:
 - a. Employer's liability insurance
 - b. £1m Professional indemnity insurance, for each and every claim
 - c. £5m Public liability insurance

Proof of insurance will be required from the successful bidder.

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
3 x Case Studies demonstrating relevant experience	0 to 5	30%
Key Project Personnel	0 to 5	20%
Project Execution including social value	0 to 5	20%

The following scoring mechanism overleaf 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 Priory and Parish Trust'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 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 and 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 and Parish Trust's requirements. The response is entirely convincing, highly detailed and demonstrates a complete understanding of and compliance with St. Osyth Priory and 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.

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 overleaf 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: $30 \times 0.927 = 27.81\%$

3.7 Clarification Meetings

- 3.7.1 As part of the tender evaluation process bidders may be required to make a presentation or attend a clarification meeting online. Bidders will be notified as soon as possible if they are required to give a presentation or attend a clarification meeting. Following the presentations / clarification meetings, 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	24 ^h July 2025
Formal Site Visits	Upon request, subject to availability, not essential
Deadline for receipt of ITT Clarification Questions	7 th August 2025
Tender Returns: ITT Submission Deadline	13 th August 2025, 5pm
Tender Evaluation Period	16 th August 2025 – 29 th August 2025
Confirmation of contract award	w/c 1 st September 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 A Form of Tender

(Also available as a Word document)

Please complete this form and include it with your responses to the questions in the Brief.

Project: St Osyth Priory & Parish Trust

Professional Service: Evaluation, Economic and Social Impact 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

£ _____ excluding VAT for the Delivery Phase

1. Resources for Development Phase

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 July – December 2025	Resource days RIBA Stage 3 including R2 submission December 2025 – August 2026	TOTAL FEE
Director				
Associate				
Senior				
Consultant				
Other – please specify				
TOTAL				

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 July – December 2025	Resource days RIBA Stage 3 including R2 submission December 2025 – 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.

2. Fee for Delivery Phase

RIBA 4 £_____ excluding VAT

RIBA 5 £_____ excluding VAT

RIBA 6 £_____ excluding VAT

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

Appendix B Draft 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 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]