



## **A STRATEGY FOR STIMULATING BUILDING PRESERVATION TRUST ACTIVITY IN THE SOUTH WEST OF ENGLAND**



**June 2012**

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Front cover (centre): visit to Poltimore House, Exeter during the UK Association of Preservation Trusts annual conference 2009;

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## Table of Contents

Acknowledgements .....	2
Index of Tables .....	5
Index of Figures .....	5
Glossary of Terms .....	6
Executive Summary .....	7
Introduction.....	11
Part 1: Context.....	12
Part 2: Key Issues.....	27
ISSUES RELATING TO TRUSTS.....	27
KEY ISSUE 1 (relating to Trusts): DEFINING BPTs.....	27
KEY ISSUE 2 (relating to Trusts): A NEW CLASSIFICATION FOR TRUSTS .....	34
KEY ISSUE 3 (relating to Trusts): DEFINING AND MAXIMIZING SUCCESS FACTORS .....	39
KEY ISSUE 4 (relating to Trusts): DEFINING AND OVERCOMING BARRIERS.....	41
KEY ISSUE 5 (relating to Trusts): MATCHING CAPACITY WITH OPPORTUNITIES .....	44
KEY ISSUE 6 (relating to Trusts): MAINTAINING & DEVELOPING STAKEHOLDERS .....	51
KEY ISSUE 7 (relating to Trusts): GOVERNANCE .....	63
KEY ISSUE 8 (relating to Trusts): STRATEGY & POLICIES .....	67
KEY ISSUE 9 (relating to Trusts): CORE FUNDING .....	69
KEY ISSUE 10 (relating to Trusts): RAISING PROFILE BY ACTIVITY PROMOTION .....	72
ISSUES RELATING TO PROJECT DELIVERY .....	74
KEY ISSUE 11 (relating to project delivery): DEFINING & MAXIMISING SUCCESS FACTORS FOR PROJECTS.....	74
KEY ISSUE 12 (relating to project delivery): DEFINING & OVERCOMING BARRIERS TO PROJECTS .....	80
KEY ISSUE 13 (relating to project delivery): PROJECT MANAGEMENT .....	83
KEY ISSUE 14 (relating to project delivery): FINANCING PROJECTS.....	86
KEY ISSUE 15 (relating to project delivery): PROJECT EVALUATION.....	90
KEY ISSUE 16 (relating to project delivery): TRANSFER OF SKILLS.....	91
Part 3: Moving Forward: Proposed Activity Plan .....	92
ACTIVITY 1: NEW MODELS OF WORKING .....	93
Recommendation 1 .....	97
ACTIVITY 2: BUILDING TRUST CAPACITY .....	98
Recommendation 2 .....	100
ACTIVITY 3: DEVELOPING AND CO-ORDINATING SUPPORT, INFORMATION, ADVICE.....	101
Recommendation 3 .....	106
ACTIVITY 4: STIMULATING NEW PARTNERSHIPS THROUGH PILOT INITIATIVES.....	108
Recommendation 4 .....	111
ACTIVITY 5: DEVELOPING OTHER PROJECTS AND/OR NEW TRUSTS .....	112
Recommendation 5 .....	115
Next Steps.....	116

Appendices .....	117
Appendix A: Trust data.....	
Appendix B: Dates of Formation.....	
Appendix C: Classification of Trusts .....	
Appendix D: Completed Projects .....	
Appendix E: History of the BPT Movement in the South West .....	
Appendix F: Funding: Heritage Lottery Fund.....	
Appendix G: Funding: English Heritage .....	
Appendix H: Funding: Architectural Heritage Fund .....	
Appendix I: Healthcheck Questionnaire .....	

## Index of Tables

Table 1: Dates of Trust formation .....	15
Table 2: Current project activity.....	17
Table 3: Funding of BPT projects.....	18
Table 4: Turnover and assets.....	18
Table 5: Trusts, Buildings at Risk, and possible pilot projects.....	25
Table 6: Number of South West BPT supporters .....	52
Table 7: Trends in BPT Trustees and supporters.....	53
Table 8: Trend in recruiting BPT Trustees .....	64
Table 9: Pipeline projects by BPT, local authority area and building classification .....	77
Table 10: Perceived value of a skilled BPT project organiser .....	85
Table 11: Sources of project funding.....	86
Table 12: Gaps in funding project phases .....	89
Table 13: BPT perception of support by funders .....	101
Table 14: BPT interest in pilot initiatives.....	110

## Index of Figures

Figure 1: Legal form of Trusts.....	29
Figure 2: Range of BPT activities .....	29
Figure 3: Category of Trust.....	34
Figure 4: BPT strengths.....	39
Figure 5: Does the role of your Trust remain appropriate? .....	48
Figure 6: How do you rate the capacity of your Trust?.....	48
Figure 7: Does your Trust have a strategy to increase capacity? .....	48
Figure 8: Perceived local community enthusiastic about saving heritage buildings.....	54
Figure 9: Perceived local community awareness of work by BPTs .....	54
Figure 10: Attitude of local authority perceived by BPTs.....	56
Figure 11: Number of BPT Trustees.....	63
Figure 12: Age profile of Trustees .....	64
Figure 13: Need for BPTs to obtain core funding.....	69
Figure 14: BPT promotional methods .....	72
Figure 15: Success factors for project delivery.....	78
Figure 16: Willingness to become BPT Project Organiser or Mentor.....	91
Figure 17: BPT perception of support by funders .....	101
Figure 18: BPT stakeholder map.....	106
Figure 19: Proposed selection criteria for BPT projects.....	114

## Glossary of Terms

AHF	Architectural Heritage Fund
APT	See UKAPT
Asset Transfer	A shift in management and / or ownership of land or buildings, from public bodies to community and voluntary sector enterprises
BaR	Buildings(s) at Risk
BASSAC	British Association of Settlements and Social Action Centres
BPT	Building(s) Preservation Trust
CAaR	Conservation Area at Risk
CPO	Compulsory Purchase Order
CPRE	Campaign to Protect Rural England
DCMS	Department for Culture Media and Sport
DTA	Development Trusts Association (see 'Locality')
EH	English Heritage
Enabling development	EH policy allowing new development provided certain criteria are met and surplus is used to conserve the historic park or building
HaR	Heritage at Risk programme of English Heritage
HBT	Historic Building(s) Trust
HCA	Homes and Communities Agency
HEF	Historic Environment Forum
HELM	Historic Environment Local Management (information and training from EH and partners for decision makers in local authorities)
HLF	Heritage Lottery Fund
Housing Association	Independent not-for-profit organisations that provide affordable homes for people in need
LEP	Local Enterprise Partnership
Locality	Formed by a merger in April 2011 of DTA with BASSAC
LPA	Local Planning Authority
NHPP	National Heritage Protection Plan: a framework for bringing together work by EH and partners within the sector to protect the historic environment
PT	Preservation Trust
RDA	Regional Development Agency (now abolished)
RPGaR	Registered Parks and Gardens at Risk
s.106	Section 106 of the Town and Country Planning Act 1990
SAVE	SAVE Britain's Heritage
SWAPT	UK Association of Preservation Trusts South West Area
SW Forum	Forum of voluntary and community sector organisations in the South West
THI	Townscape Heritage Initiative, a specific funding programme by HLF
UA	Unitary Authority: a type of local authority that has a single tier and is responsible for all local government functions within its area
UKAPT	UK Association of Preservation Trusts

## Executive Summary

### Context

The care and protection of the historic environment is of particular importance in the South West of England because of the major contribution it makes to the economy of the area. In addition to the economic benefits, its social, environmental and cultural value is a major attraction to residents, businesses and visitors and as such gives the South West its unique character. The work of Building Preservation Trusts (BPTs) makes a significant contribution to this by bringing neglected historic buildings back into use, often with new community uses.

There are over 50 active BPTs in the South West and a further 6 trusts with a national remit operate in the area. BPTs here have a strong track record in saving Buildings at Risk, with over 120 projects completed across the South West, attracting over £20 million in investment. Such projects contribute to sustainable development and raise the profile and public awareness of the historic environment in the area.

Many of the region's characteristics favour a strong BPT presence – a strong tradition of heritage provision and investment to cater for the tourist industry, an ageing but still affluent population (yielding volunteers and individuals able to provide philanthropic support), a population keen to embrace sustainable solutions and who favour the South West for providing a safe, clean and attractive living environment.

There is therefore a noticeable 'bond' of mutual help and support between BPTs in the South West, providing more cohesion than currently seen in other areas in England. This is, in fact, the strongest area of activity in England, and in this respect allies itself closely with many of the characteristics articulated for the Scottish BPT movement in the Ecotec Report<sup>1</sup>. The movement is still vibrant; in addition to many that are well established, new Trusts are being formed, and this study has revealed an impressive 44 projects in the pipeline. Over half of these address Buildings at Risk on the English Heritage *Heritage at Risk Register 2011*.

23 Trusts operate as multi-project Trusts, though few follow a traditional 'revolving fund' model; the majority (34) are effectively single project Trusts. Although primarily focused on rescuing Buildings at Risk, the role and aims of BPTs in the South West has in some cases widened, and in other cases changed over time.

Many have access to paid advice, but BPTs in the South West are primarily volunteer organisations (Scotland has a higher number of Trusts with professional staff) drawing on the support of some 9,500 members, Friends and supporters. Governance and recruitment of Trustees however is a key issue.

There is a disparity between Trusts that are well resourced and others that have extremely limited resources, but overall the BPT movement in the South West is better resourced and benefits from a more sizeable asset base than in other areas. Some Trusts though are failing to move projects forward, despite there being plenty of Buildings at Risk in need of rescue.

Based on 57 telephone interviews, from which a sample of 24 Trusts was selected for further face-to-face interview, the key concerns and aspirations of BPTs to emerge are:

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<sup>1</sup> "Study of Building Preservation Trusts in Scotland" (February 2010) commissioned by Historic Scotland, the Heritage Lottery Fund and the Architectural Heritage Fund, working in partnership with the UK Association of Building Preservation Trusts (Scotland).

## Issues relating to Building Preservation Trusts

**Defining BPTs** – a wider definition of BPTs is recommended to embrace all charitable organisations undertaking work to the rescue and rehabilitation of historic buildings at risk.

**Classification of BPTs** – a new cross-cutting grouping of trusts should help to provide new networking opportunities for similar trusts across the UK.

**Defining and maximising success factors** – the track record and experience of trusts, their 'lean' and flexible nature, and the persistence and dedication of trust volunteers are defined as key factors; these should be much more widely acknowledged and are deserving of greater levels of support.

**Defining and overcoming barriers** – governance, striving for a sustainable model, and lack of profile are seen as key barriers to be overcome.

**Opportunities to build capacity** – a thorough review of capacity demonstrates that initiatives should be targeted primarily at delivering the current project portfolio of 44 projects.

**Stakeholders** – there is a great deal of (immeasurable) goodwill to trusts, evidenced especially in the 9,500 supporters of the movement. A broader engagement with communities and other partners is needed, and the present savage onslaught on conservation provision in local planning authorities is a matter of grave concern. (See <http://www.helm.org.uk/upload/pdf/Impl-HPRRef2011.pdf>)

**Governance** – the average age of most Boards is between 50 and 70 years old, and whilst this represents a reservoir of accumulated skills and expertise, few trusts have a recruitment strategy to ensure smooth succession planning.

**Strategies & policies** – many trusts lack strategies and policies as a means of ensuring both robust planning and operation, as well as providing confidence for investors.

**Core funding** – some trusts cover core costs through investment income, whilst trading and membership subscriptions are other important sources. Clearly most trusts struggle to build the infrastructure necessary to deliver increasingly more complex projects and reliance on local authority grant aid is highly vulnerable. The outcome regarding potential Heritage Lottery Fund grants to support capacity building in voluntary organisations is eagerly awaited as there is a lack of initiatives that directly support capacity building within trusts.

**Raising profile** – trusts tap into a variety of media to publicise their work, but there is consensus that much more needs to be done to celebrate this work and its achievements.

## Issues relating to project delivery

**Defining and maximising success factors** – the sheer number of projects currently being developed, together with the clear appetite to explore new opportunities are a key finding of the study. The resilience and ability of trustees and other project personnel, lean project costs and partner support all contribute to a successful project recipe.

**Defining and overcoming barriers** – certain stages in the project funding cycle – for example the development stage following an options appraisal – are seen as particularly challenging where momentum tends to fade. A toolkit to progress projects and comprising strong CPO powers, fairer VAT rules and legislative 'elbow' is lacking, and the impact of the Localism Act on providing assistance for smaller voluntary organisations is still unclear.

**Project management** – tends to be located within the trusts themselves, either using staff, or more commonly, drawing on particular trustees. External consultants are often used for



single building projects, raising the issue of transferability of skills, particularly as the trend has been towards single building projects and away from the 'revolving fund' model.

**Project funding** – local authority funding features in a number of projects and is clearly vulnerable in the present climate, as is investment income, another important contributor. More collaboration between principal funders and less demanding criteria would be helpful. Other funding opportunities such as community shares should be investigated.

**Evaluation** – measuring the impact and benefits of BPT projects has not taken place in any systematic way. This is a key area that needs addressing so that the true value of BPTs can be demonstrated to attract further investment and funding.

**Transfer of skills** – BPTs should be recognised as vehicles for building capacity in the community to undertake building rescue projects. Funders have their own agendas and objectives (to deliver learning opportunities, increase loan activity, address targets set by the National Heritage Protection Plan such as saving Buildings at Risk, etc). BPTs can and do deliver on all these objectives but the key issue of ensuring continuity rather than an eternal re-inventing of the wheel needs to be urgently addressed.

## Conclusions

A clear route-map of the origins, development and a future path for the BPT movement in the South West has been charted, providing a realistic assessment of its strengths and weaknesses and its capacity to undertake projects. Inevitably there are constraints and limitations, but the message is clear – great things have been achieved (there is a sense that in many cases it is 'against all the odds') and more importantly, a great appetite exists to undertake further work. There are emerging opportunities through the asset transfer process, right to buy, neighbourhood planning and new Community Infrastructure Levy arrangements, for BPTs to embrace and benefit more extensively from the Localism agenda. To rise to these new challenges, trusts urgently require help to deliver these projects more efficiently and effectively. In particular, there is an opportunity to increase the impact of BPTs by encouraging and supporting a transition of single project trusts, or so-called revolving-fund trusts unable to move forward beyond their first project, into successful multi-project trusts where skills are transferred and knowledge is not dissipated.

**Recommendation 1: Research:** the UK Association of Preservation Trusts (UKAPT) should build on the data here and earlier studies to carry out further research into:

- a) optimum operational models for BPTs;
- b) the scope for establishing new Trusts or amalgamating existing ones;
- c) issues of core funding including options to unlock reserves and encourage further investment.

**Recommendation 2: Build capacity:** UKAPT should work with partner organisations to deliver structured training and development programmes to assist South West BPTs with:

- a) governance, recruitment and succession planning;
- b) provision of strategies and policies;
- c) business planning;
- d) production of marketing and communication plans;
- e) methodologies and techniques for evaluating projects.

**Recommendation 3: Support:** UKAPT should improve its support network for members in the South West by:

- a) developing the UKAPT website to include provision of member services to complement the training and development programme;
- b) delivering a mentoring programme;

- c) working with its partners, such as the Regional Support Officer employed by the AHF to develop the role of SWAPT in the South West area by building links between SWAPT and the South West Historic Environment Forum, local authority conservation teams, and other players in the historic environment and social enterprise sectors.

**Recommendation 4: Pilot Initiatives:** UKAPT should seek funding, where appropriate in conjunction with other partners, to enable it to support, monitor, and evaluate projects embarking upon the four pilot initiatives, including testing of existing guidance for asset transfer and producing new guidance for the other initiatives:

- a) community asset transfers, involving BPTs, community groups, and local authorities;
- b) affordable housing, involving partnerships between BPTs and housing associations;
- c) BPTs taking a lead role in area-based schemes, with BPTs and local authorities working together; and
- d) enabling development, with BPTs working with private developers.

**Recommendation 5: Other Projects:** Resources should be focused on completing existing projects. Where high priority Buildings at Risk are not current projects UKAPT, via SWAPT, should encourage existing BPTs to take on those projects or explore establishing new Trusts.

By building on these recommendations and a successful track record in the South West, BPTs and UKAPT, working with other partners where appropriate and with essential support from funders, can play a key role in stimulating an increased number of building conservation projects.

## Introduction

The UK Association of Preservation Trusts in conjunction with English Heritage has appointed the services of DTS Solutions to undertake this study of Building Preservation Trust activity in the South West of England.

The study has a principal overarching aim of identifying a number of pilot initiatives in the South West to be taken forward by Building Preservation Trusts (BPTs) operating in the South West area, either singly or in partnership. Prior to this, four preliminary research tasks have been carried out to assist in justifying the selection of the pilot initiatives.

- Task 1 A review of the context within which Building Preservation Trusts operate in the South West
- Task 2 A review of BPT activity in the South West
- Task 3 An analysis of the issues facing BPTs in the South West as a means of creating a 'Health' checklist for organisations to help define the capacity of BPTs to undertake the pilot initiatives
- Task 4 Provision of an assessment of the role of Project Organisers in the delivery of BPT projects

The next step then defined the selection criteria for the pilot initiatives. This has resulted in a potential 'shopping list' of projects that might be tackled as a further extension of this study.

Key elements of the research approach included:

- i. a review of relevant documents and data, gathered from funders etc;
- ii. a survey of 83 BPTs in the South West, selected by trawling through UKAPT membership lists, AHF Reviews and grant/loan records and searches on the Charity Commission website;
- iii. from this list, 53 Trusts were selected for telephone interviews; these were conducted between January and March 2011;
- iv. and from this exercise, 24 face-to-face interviews with Trusts were carried out during February and March 2011;
- v. consultations with 33 wider stakeholders (including local planning authorities);
- vi. presentations at three APT South West meetings at Tavistock (30.3.2011) Langport (20.7.11) Bristol (19.10.11).
- vii. a workshop at Exeter (30.3.12) and launch with stakeholders to discuss study findings at Poltimore House (4.7.12).

In terms of presentation of the final report, Task 1 appears as 'Context' below. Task 2 is divided into two parts - examining the evolution of Trusts which appears as an Appendix to the Report and a review of present activity, which provides some of the material for Part 2 of the Report. Tasks 3 and 4 provide the rest of the material for Part 2. Part 3 of the Report presents the material relating to the pilot initiatives, as part of an overarching Activity Plan for taking the recommendations of this study forward.

## Part 1: Context

The Government's Big Society vision aims to help community and voluntary organisations play a greater role in all aspects of society. DCLG defines Localism, as:

*"...a radical shift in the balance of power and to decentralise power... to the lowest possible level, including individuals, neighbourhoods, professionals and communities as well as local councils and other local institutions."*

Key objectives of the Localism agenda include:

- giving power to individuals themselves, for services which are used individually;
- for services enjoyed collectively, they should be delivered by accountable community groups;
- where the scale is too large or those using a service are too dispersed, they should be delivered by local institutions, transparently and with full democratic checks and balances.

In the historic environment sector, Building Preservation Trusts in the South West Area have been playing a crucial role in improving local areas and taking on vulnerable historic buildings for many years. There are also new emerging opportunities through the asset transfer process, right to buy, neighbourhood planning and new Community Infrastructure Levy arrangements for BPTs to benefit more extensively from the Localism agenda.

*"With the region's high quality of environment and diverse cultural assets such investment can only be a positive thing, helping to build on our strengths. With high levels of civic participation and volunteering and a thriving 'third' sector, we are well placed to benefit from the Big Society, providing the support is available for those wanting to get involved."*

("The Changing State of the South West 2012" (March 2012); South West Observatory)

### The South West Area

Classified as the most rural English region, the South West covers the largest area of the nine English regions. The South West has a relatively small total population; the third smallest of the nine English regions, exceeding only the East Midlands and the North East. The South West covers 9,200 square miles (23,828 km<sup>2</sup>) and comprises Bristol, Gloucestershire, Somerset, Dorset, Wiltshire, Devon, Cornwall and the Isles of Scilly. Currently, there are 41 local authorities in the South West. Four of these are County Councils that between them contain a total of 25 district councils. Outside of the county governance structure, the area also has 12 unitary authorities. The largest city is Bristol (shortly to have an elected mayor). Other major urban centres include Plymouth, Swindon, Gloucester, Exeter, Bath, and the South East Dorset conurbation of Bournemouth, Poole and Christchurch. Nearly 40% (880,000 hectares) of the South West is a protected landscape – either National Park (Dartmoor, Exmoor and a small area of the New Forest) or Area of Outstanding Natural Beauty (there are 14 wholly or partly within the region) and also includes four World Heritage Sites, including Stonehenge. Of the region's 2,100km coastline, 638km (one third) is Heritage Coast – 60% of the total for England

The large South West area, stretching as it does from the Isles of Scilly to Gloucestershire, does however encompass diverse areas which have little more in common with each other than they do with other areas of England. The South West therefore does not possess a strong cultural and historic unity and there is no single acknowledged regional "capital". Nevertheless there is a strong 'bond' of mutual help and support between BPTs in the South

West, providing more cohesion than currently seen in other areas of England.

Key characteristics of the area, relevant to this study are:

- A greater proportion of inhabitants of pensionable age than any other English regions (19.6% of the total South West population). This proportion is set to rise; the region is predicted to have over a quarter of its population aged 65+ by 2030, remaining the highest proportion in the country.
- In 2008-10, the South West and South East had the joint highest life expectancy of all the English regions for women (83.5 years), and the South West had one of the highest for men (79.5 years). The comparable figures for England were 82.6 years for women and 78.6 years for men.
- In 2009, the second lowest proportion of its population categorised as non-white British, at 7.0% (only exceeding the North East).
- The region's population increased faster than in England as a whole between 2001 and 2010, growing by 330,000 or 6.7 per cent compared with 5.6 per cent for England.
- In 2010, relative to total population, South West England generated £18,669 of GVA per head of population - this was the highest ever level in nominal terms
- A strong Higher Education presence with 165,140 students in 2009/10 - providing potentially fruitful partnerships with universities
- 2.4m dwellings in the South West in 2011, with a falling housing supply – favouring conversion of historic buildings to meet residential needs
- Concerns over carbon consumption and climate change, favouring the sustainable re-use of buildings
- In 2010/11 the total recorded crime rate in the South West was 62.3 offences per 1,000 population, compared to the England rate of 75.1 and the England and Wales rate of 75.7. This was the lowest rate for any region, just below the East of England.
- The South West has the highest score of any English region of people agreeing that “many people in their neighbourhood can be trusted”, and the second highest proportion believing that they “*feel able to influence decisions affecting their local area and Great Britain*”.
- The last Citizenship Survey figures show that the England average for regular participation in volunteering is 23%, with the South West the highest of the English regions, at 28%.
- The South West has relatively low levels of deprivation, strong communities, high levels of civic participation and historically has had high levels of national immigration; many moving to the region seeking improved quality of life and living environment.
- In the South West, the region's cultural and creative economy is a source of

enterprise, employment and enjoyment. Of four DCMS cultural sectors (creative, heritage, museums galleries libraries and archives, sport), the creative sector remains the strongest with turnovers increasing by 36% between 2005 and 2009 compared to an 11% average increase in England (CASE, May 2011).

- An important element of the 'Big Society' is to encourage philanthropic attitudes and charitable donations. The "Taking Part" survey (DCMS, December 2011) found 88.4% of adults had donated money in the last 12 months with 33.0% donating to any DCMS sector. Of DCMS sectors in receipt of charitable-giving, the highest were heritage (16.0%) and museums and galleries (15.2%). Interestingly, an Arts & Business survey (January 2011) found private investment in culture decreased by 3% across England between 2007/08 and 2009/10 but increased by 25% in the South West during the same period. These percentages obscure the substantial amount of money donated by ordinary people at a time of rising living costs.
- Data from the same "Taking Part" survey show high levels of adult engagement in the arts (80.2% in the South West compared to 75.9% in 2009/10) and visits to a heritage site (73.3% in the South West). Across England, adult visits to a museum or gallery between July and September 2011 were the highest on record - with the region's annual rate increasing from 39.8% to 42.5% (2009/10 to 2010/11).
- As an additional indicator of the strength of tourism to the region, of 29.8 million inbound visitors to the UK who spent £16.9 billion in 2010, 2.1 million visited the South West and generated £902 million in spend (EnjoyEngland, 2011). There were over 6.2 million visits to National Trust and English Heritage properties in the South West in 2010/11.

Against these statistics, all generally favourable to supporting a thriving BPT movement, should be set more pessimistic findings in terms of the immediate outlook for the region - demand is subdued in many South West markets and recent business surveys indicate business caution on the supply side. The area's efforts to restructure its economy are hampered by its historical reliance on domestic demand from consumers and the public sector. Indications are that public sector employment is declining faster in the region than elsewhere, falling from a peak at the end of 2009 (553,000 to 508,000). The region has experienced the largest absolute (excluding London) and relative declines in public sector employment. Between Q4 2009 and Q2 2011, public sector employment declined by 8.2% - significantly higher than the 4.6% seen nationally. In 2010/11 there were 147.3 full time equivalent (FTE) local authority historic environment staff in the South West, 12.3 FTE fewer than 2009/10. Nationally, there has been a 5.6% reduction in the number of local authority historic environment staff between 2003 and 2011, but in the South West the figure is higher, at 11.4%.

The decline in the public sector is particularly worrying given the essential reliance on local authorities to nurture, feed and support the BPT Sector. Also of concern is the high rate of unemployment among 16-24 year olds. Additionally and perhaps ironically, the relative affluence of the region and high levels of volunteering also means that funders aiming to address social deprivation etc might look less favourably on the South West area for investment opportunities.

(For further information on the South West Region, see <http://hc.english-heritage.org.uk/content/pub/2011/hc-2011-South West.pdf> and

## Distribution of Trusts

With a relatively small population of around 5 million, the South West has well over 50 active Trusts, of whom 33 are members of UKAPT. None of these Trusts actively operates across the whole of the South West. 6 UK Trusts who are members of UKAPT have undertaken work or given advice in the South West. At the sub-regional level, South West BPTs are fairly evenly distributed over the South West area when considered in terms of their population densities. There is also little evidence of duplication or competition – rather there has been a co-operative spirit of joint working. However, in some areas, for example in parts of Dorset and North Devon there is little activity and these areas could be classified as 'cold spots'. This inactivity, or where Trusts are 'in limbo', could be addressed by providing support to improve the skills and expertise with the Trusts themselves through training at a local level and also by providing easy free access to a range of technical support. There may also be scope for encouraging people with local interest in their historic environment to form new Trusts around the proposed pilot initiatives.

## Formation

The dates when the 57 Trusts in the South West were formed range between 1934 and 2011. The table below demonstrates the decadal pattern, and the fact that the movement in the South West is both extremely mature as well as vibrant, with Trusts still being formed. However, some Trusts formed from the 1980's onwards and not included in this study have ceased to operate. These were principally single building Trusts; only a few – the Dorset Building Preservation Co., the Weston-Super-Mare Trust, Chippenham Civic Society Trust Ltd and Ilfracombe Building Preservation Trust being the chief examples – have failed as revolving fund Trusts.

DATES OF TRUST FORMATION	
<b>Pre 1970</b>	5
<b>1971-1980</b>	6
<b>1981-1990</b>	13
<b>1991-2000</b>	16
<b>2001-2010</b>	17
<b>Total</b>	57

Table 1: Dates of Trust formation

## Type

All the Trusts are registered as charities and companies limited by guarantee. 23 Trusts are multi-project or revolving fund Trusts, where, theoretically, the surplus from the first project is invested in the second. These are classified by County (4), Urban (16), Village (1), and Themed (2). In reality, only a few of these could be said to operate successfully on a 'traditional' BPT type model. Some retain and manage property, some have only carried out one project, or have not carried out projects in the past few years, while others are carrying out other heritage-related activities.

The majority of Trusts (34) in fact focus on single site/building projects, where any initial surplus is commonly used to maintain the property by the Trust or successor owner. All

Trusts share the core objective of rescuing Buildings at Risk, and all Trusts are predicated on voluntary action and commitment to place-making. Trusts have been formed by people who passionately care for their local historic environment.

## **Aims**

Specific reasons for the initial set up for both single and revolving Trusts are varied. While most inevitably focused on rescuing a building or set of buildings at risk, the remit of Trusts may also embrace wider aims that include education, local history, religious heritage, tourism, regeneration, employment and skills training. The role and aims of the BPT movement in the South West, certainly for the more recent BPTs, has in some cases widened, and in other cases changed over time.

## **Structure and Governance**

The diversity of BPTs in the South West is both an indicator of the strength of the movement, as well as a reminder there is no 'one-size-fits-all' solution; in some cases there is a danger that Trusts are inevitably stretched to fulfil their ambitious aims as well as faced with the difficulty of maintaining revenue to cover running and staff costs.

Governance is a key issue that has emerged from this study. Many boards consist of elderly Trustees; consequently such Trusts may be more risk averse. Experience and expertise are nevertheless key qualities to be harnessed – the challenge is how to ensure 'new blood' is constantly injected into Trusts, to overcome the lack of appetite to undertake projects that tends to creep into Trusts. This 'cultural/life-cycle' aspect of BPTs is almost impossible to measure, but several examples were noted where Boards had been refreshed and new life consequently breathed into levels of Trust activity.

A number of Trusts employ staff. The County Trusts all have access to some project management or administrative staffing. Some of the larger, well-established Town Trusts such as Bath PT, Bristol BPT, Gloucester HBT and Plymouth Barbican have paid staff although their roles tend to encompass much wider responsibilities than managing building projects. None of the single building Trusts are currently employing permanent staff to manage the building aspect of their project.

## **Past Activity**

Trusts in the South West have delivered a substantial legacy in terms of saving and re-using historic buildings in the South West area. Details of over 120 projects are listed in the Appendix – there are no doubt more to be added.

## **Current Project Activity**

There are currently 44 projects in the pipeline<sup>2</sup>, in the South West, involving a total of 40 different Trusts and more than 50 buildings. These include two projects being undertaken by

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<sup>2</sup> For the purposes of this report "pipeline" refers to all projects being pursued by a charitable Trust to rescue an historic building (on the statutory list, locally listed or located in a Conservation Area), at any stage from initial options appraisal work through to being on site with the final building contract to deliver the project; this includes some projects that may have stalled in the past, but where work to progress them is now being undertaken by the Trusts in question.



Trusts with a national remit: SAVE (Castle House, Bridgwater) and the Landmark Trust (Belmont House, Lyme Regis). Half of the projects involve buildings “at risk” on the English Heritage *Heritage at Risk Register 2011*.

CURRENT PROJECT ACTIVITY		
	Sites	Buildings
<i>Buildings at Risk (EH Heritage at Risk Register 2011):</i>		
Grade 1	4	8
Grade II*	15	18+
Scheduled Monument	1	1
Conservation Area at risk	1	1
<i>Other:</i>		
Grade 1	3	3
Grade II*	4	4
Grade II	13	13+
Locally Listed & Other	3	3
<b>Total</b>	<b>44</b>	<b>51+</b>

Table 2: Current project activity

Projects are currently being mapped on UKAPT’s website ([www.ukapt.org.uk](http://www.ukapt.org.uk)). There is a good spread of projects across the South West area, although areas of relative present inactivity include Gloucestershire, Dorset (where there is no County Trust) and Wiltshire. As this report indicates, it is not so much a question of identifying ‘cold spots’ as ensuring that present multi-project Trusts are provided with requisite support both to complete the projects being undertaken by them, undertake any further projects identified through a Heritage at Risk programme to prioritize Buildings at Risk, and provide mentoring support to single building preservation trusts so as to ensure expertise and skills are not dissipated.

### Stakeholders and Partners

Most Trusts involve stakeholders and partners beyond their nominated Trustees. Most rely heavily on volunteers; some have Friends groups. Through such avenues, BPTs engage with and touch a huge number of volunteers – this study demonstrates some 9,500 volunteers are involved in the BPT movement in the South West. There is clearly considerable scope for this ‘willing army’ to be better mobilized.

It is encouraging to see that BPTs already engage with a very wide variety of partners. Again, there is scope, particularly through the pilot initiatives, to broaden this interaction.

### Funding

Trusts have attracted investment from a diverse array of sources. Key inputs have been:

FUNDING OF BPT PROJECTS			
<b>HLF</b>	1995-2010		c. £14 million
<b>EH</b>	2005-2010		c. £1.3 million
<b>AHF</b>	1977-2010	Refundable	£5.03 million
		Non-Refundable	410k

Table 3: Funding of BPT projects

There are of course many others who have contributed to the work of BPTs in the South West - Big Lottery, European Funding, charitable Trusts, etc.

### Assets

20 Trusts have an annual turnover of less than £10,000. This does not mean that they are necessarily 'inactive', but may be at the development stage for new projects. The total assets and reserves of BPTs in the South West are more extensive than in other areas.

TURNOVER AND ASSETS (2008/9)	
<b>£0-£1k</b>	6
<b>£1k-10k</b>	14
<b>£10k-50k</b>	10
<b>£50+</b>	17
<b>No data</b>	10
<b>Total Income (47 Trusts)</b>	£4,346,042
<b>Total Spend (47 Trusts)</b>	£4,054,590
<b>Total Reserves (19 Trusts)</b>	£10,916,507

Table 4: Turnover and assets

Some Trusts have considerable reserves which are not currently being put to 'work'. The scale of voluntary input into the BPT movement should also be seen as an asset and should be valued for its achievements and for the considerable benefits it brings. Many Trusts who recognise the role of volunteers also see the real match funding opportunities that voluntary activity can bring to a project.

### Buildings at Risk

Data on Buildings at Risk is included within the Appendices. Current data is patchy (40% of LPAs in the South West do not collect data on BaR at all and only half that do make the information publicly available) and demonstrates the urgent need for a survey of the South West area to identify neglected heritage assets, with an assessment of their potential to translate into potential BPT projects. This would also require a further review of the capacity of existing Trusts and the scope for the formation of new Trusts to undertake potential new projects identified by such a survey.

The above information is captured in the following Table, aligned with data gathered by the research for this report on current BPT activities and willingness to take on new projects.

Trust situated within		Name of trust	Formed	Type: Single Site (SS) or Multi Project (MP)  (details in Key Issue 2 section)	Projects in pipeline? (details in Key Issue 11 section)  (BaR = entry on EH HaR Register 2011)	Willing to take on future projects?  (Yes = 24 Trusts)	Capacity to take on pilot project?  (Yes = 20, from 24 "willing" Trusts)	Aware of a building suitable for a pilot project? (asked only of 24 "willing" trusts)  (details in Activity 4 section)				Local BaR Register to inform future priorities?  (Source: English Heritage, 2011)	Are there BaR which may be suitable future projects subject to further investigation?  EH HaR Register 2011 entries in trust area not already being tackled (Multi Project trust areas only)	
County or Unitary Authority	Local authority							Asset transfer	Housing Association	THI	Enabling development			
Bath and North East Somerset	Bath and North East Somerset	Bath Preservation Trust	1934	MP- URB	Y							Y	Yes. 7 BaR in Bath - may not all be suitable for BPT. Also a number of CAaR.	
		Cleveland Pools Trust	2005	SS – POOL	Y (BaR)								Y	N/A - Single Site Trust
		Walcot Street Trust	2005	MP – URB	N	Y	Y	Y	N	Y	Y	Y	Y	Yes. 7 BaR. Also a number of CAaR.
City of Bristol	City of Bristol	Arnos Vale Cemetery Trust	2007	SS – CEM	Y (BaR)							Y	N/A - Single Site Trust	
		Bristol Buildings Preservation Trust Ltd, The	1981	MP – URB	Y (BaR)	Y	N	Y	Y	N	N	Y	Y	Yes. 11 BaR, 1 CAaR and 1 RPGaR. Some already being tackled by Trusts. Further analysis needed.
		Bristol Visual & Environmental Buildings Trust	1982	MP – URB	N	Y	Y	Y	N	N	N	Y	Y	Yes. 11 BaR, 1 CAaR and 1 RPGaR. Some already being tackled by Trusts. Further analysis needed.
		Hope Community Church (took over Hope Chapel from Hotwells & Clifton Wood Community Trust)	1994	SS – ECC	Y								Y	N/A - Single Site Trust
		LoveBristol	2006	MP – URB	Y (BaR)	Y	Y	Y	Y	Y	Y	Y	Y	Yes. 11 BaR, 1 CA and 1 RPG on HaR Register 2011. Some already being tackled by Trusts. Further analysis needed.
		Spike Island Artspace Bristol	1991	SS - CB	N								Y	N/A - Single Site Trust

Trust situated within		Name of trust	Formed	Type: Single Site (SS) or Multi Project (MP)  (details in Key Issue 2 section)	Projects in pipeline? (details in Key Issue 11 section)  (BaR = entry on EH HaR Register 2011)	Willing to take on future projects?  (Yes = 24 Trusts)	Capacity to take on pilot project?  (Yes = 20, from 24 "willing" Trusts)	Aware of a building suitable for a pilot project? (asked only of 24 "willing" trusts)  (details in Activity 4 section)				Local BaR Register to inform future future priorities?  (Source: English Heritage, 2011)	Are there BaR which may be suitable future projects subject to further investigation?  EH HaR Register 2011 entries in trust area not already being tackled (Multi Project trust areas only)	
County or Unitary Authority	Local authority							Asset transfer	Housing Association	THI	Enabling development			
City of Bristol, Bath and North East Somerset, South Gloucestershire	City of Bristol, Bath and North East Somerset, North Somerset, South Gloucestershire	Avon Industrial Buildings Trust Ltd	1980	MP – THEME	Y (BaR)	Y	Y	Y	N	Y	Y	Y (except for NSC)	Yes. A number of Industrial BaR in the four local authority areas (if this is the AIBT coverage). Further analysis needed.	
Cornwall	Cornwall	Cornwall Buildings Preservation Trust, The	1973	MP – C	Y (BaR x 2)	Y	Y	Y	Y	Y	Y	N	Yes. 31 BaR, 1 CA and 1 RPG on HaR Register 2011. Some already being tackled by Trusts (Duchy Palace). Further analysis needed.	
		Rame Conservation Trust	1997	SS – CB	Y (BaR)								N	N/A - Single Site Trust
		Trenance Cottages	2009	SS – CB	Y								Y	N/A - Single Site Trust
Devon	North Devon	Barnstaple Buildings Preservation Trust	2007	SS – ECC	Y							Y	N/A - Single Site Trust	
	Mid Devon	Coldharbour Mill Trust	1989	SST – MUS								N	N/A - Single Site Trust	
		Cullompton Walronds Preservation Trust	1997	SS – CB	Y (BaR)	Y	N	Y	N	N	Y	N	N/A - Single Site Trust	

Trust situated within		Name of trust	Formed	Type: Single Site (SS) or Multi Project (MP)  (details in Key Issue 2 section)	Projects in pipeline? (details in Key Issue 11 section)  (BaR = entry on EH HaR Register 2011)	Willing to take on future projects?  (Yes = 24 Trusts)	Capacity to take on pilot project?  (Yes = 20, from 24 "willing" Trusts)	Aware of a building suitable for a pilot project? (asked only of 24 "willing" trusts)  (details in Activity 4 section)				Local BaR Register to inform future future priorities?  (Source: English Heritage, 2011)	Are there BaR which may be suitable future projects subject to further investigation?  EH HaR Register 2011 entries in trust area not already being tackled (Multi Project trust areas only)
County or Unitary Authority	Local authority							Asset transfer	Housing Association	THI	Enabling development		
Devon	Devon	Devon Historic Buildings Trust	1973	MP – C	Y	Y	Y	N	N	N	N	NA	Yes. 26 BaR in Devon; some Places of Worship and some already covered by Trusts (Poltimore). Possibly some opportunities.
	Exeter	Exeter Canal and Quay Trust Ltd	1981	MP – URB	Y x 2	Y	Y	N	Y	N	Y	Y	No. There are 4 Conservation Areas at Risk in Exeter.
		Exeter Historic Buildings Trust	1996	MP – URB	Y	Y	Y	N	N	N	N	Y	No. There are 4 Conservation Areas at Risk in Exeter.
	Torridge	Great Torrington Buildings Preservation Trust	2003	SS – CIVIC	Y							Y?	N/A - Single Site Trust
	East Devon	Poltimore House Trust	2000	SS – CH	Y (BaR)	Y	Y	N	Y	N	Y	Y	N/A - Single Site Trust (but indicated willingness to undertake a future project)
	South Hams	Totnes and District Preservation Trust, The	1985	MP – URB	Y	Y	Y	N	N	N	N	Y	No. Of the 2 BaR in South Hams, neither in Totnes.
	Torridge	Yarner Trust	1980	SS – MISC	N							Y?	N/A - Single Site Trust
Dorset	West Dorset	Beaminster Museum Trust	1988	SS – MUS	N							Y	N/A - Single Site Trust
		Bridport Area Development Trust	2009	SS – CIVIC		Y	Y	Y	N	N	Y	Y	N/A - Single Site Trust (but indicated willingness to undertake a future project)
		Lyme Regis Development Trust (Lyme Arts Community Trust)	1999	MP – URB	Y (new build)	Y	D/K	N	N	N	N	Y	No. No BaR in Lyme Regis.

Trust situated within		Name of trust	Formed	Type: Single Site (SS) or Multi Project (MP)  (details in Key Issue 2 section)	Projects in pipeline? (details in Key Issue 11 section)  (BaR = entry on EH HaR Register 2011)	Willing to take on future projects?  (Yes = 24 Trusts)	Capacity to take on pilot project?  (Yes = 20, from 24 "willing" Trusts)	Aware of a building suitable for a pilot project? (asked only of 24 "willing" trusts)  (details in Activity 4 section)				Local BaR Register to inform future priorities?  (Source: English Heritage, 2011)	Are there BaR which may be suitable future projects subject to further investigation?  EH HaR Register 2011 entries in trust area not already being tackled (Multi Project trust areas only)
County or Unitary Authority	Local authority							Asset transfer	Housing Association	THI	Enabling development		
Dorset	West Dorset	Sherborne House Trust and Friends of Sherborne House	1995	SS – CH	Y (BaR)							Y	N/A - Single Site Trust
	West Dorset	Town Mill Trust, Lyme Regis	1994	SS – IB	N							Y	N/A - Single Site Trust
		Wolfeton Riding House Trust	1997	SS – CH	Y (BaR)							Y	N/A - Single Site Trust
	Purbeck	Swanage Pier Trust	1984	SS – PIER	Y							Y	N/A - Single Site Trust
Gloucestershire	Forest of Dean	Gunns Mill (new Trust to be formed)			Y (BaR)								
		Hartpur Historic Land and Buildings Trust (now Hartpur Heritage Trust)	1998	MP – RUR	Y	Y	Y	N	Y	N	N	Y	Yes. 7 BaR (some Places of Worship).
	Gloucester	Gloucester Historic Buildings Ltd	1980	MP – URB	N	Y	Y	Y	Y	Y	N	Y	Yes. Of the six BaR in the City, four are Llanthony which has its own Trust. The other two are Fleece Hotel and Tanner's Hall. Also 1 CAaR (noted that Trust indicated a possible THI pilot).
Llanthony Secunda Priory Trust		2007	SS – ECC	Y (BaR x5)	Y	Y	N	N	N	N	Y	N/A - Single Site Trust (but indicated willingness to undertake a future project)	

Trust situated within		Name of trust	Formed	Type: Single Site (SS) or Multi Project (MP)  (details in Key Issue 2 section)	Projects in pipeline? (details in Key Issue 11 section)  (BaR = entry on EH HaR Register 2011)	Willing to take on future projects?  (Yes = 24 Trusts)	Capacity to take on pilot project?  (Yes = 20, from 24 "willing" Trusts)	Aware of a building suitable for a pilot project? (asked only of 24 "willing" trusts)  (details in Activity 4 section)				Local BaR Register to inform future future priorities?  (Source: English Heritage, 2011)	Are there BaR which may be suitable future projects subject to further investigation?  EH HaR Register 2011 entries in trust area not already being tackled (Multi Project trust areas only)
County or Unitary Authority	Local authority							Asset transfer	Housing Association	THI	Enabling development		
Gloucestershire	Stroud	Stroud Preservation Trust Ltd	1982	MP – URB	Complete	Y	Y	N	N	N	N	Y	Yes. 5 BaR
		Woodchester Mansion Trust, The	1989	SS – CH	Y (BaR)								Y
North Somerset	North Somerset	Birnbeck Regeneration Trust	2004	SS – PIER	Y (BaR)							N	N/A - Single Site Trust
Plymouth	Plymouth	Ford Park Cemetery Trust	1999	SS – CEM	N							Y	N/A - Single Site Trust
		Plymouth Barbican Association Ltd	1957	MP – URB	N								Y
Somerset	Mendip	Frome Historic Buildings Trust Ltd, The	1975	MP – URB	N							Y	No. No BaR in Frome, but 3 in Mendip District
		Shepton Mallet Amenity Trust Ltd	1967	SS – MISC	N								Y
	Sedgemoor	Halswell Park Trust, The	1996	SS – CH	N							Y	N/A - Single Site Trust
	Somerset	Somerset Building Preservation Trust Co Ltd	1988	MP – C	Y (BaR)	Y	Y	N	N	N	Y	NA	Yes. 21 BaR, 6 RPGaR and 4 CAaR in County. Some already being tackled by Trusts. Further analysis needed.
	South Somerset	Coker Rope and Sail Trust	2010	SS – IB	Y (BaR)								Y
Somerton Historic Buildings Preservation Trust		2009	SS – CB	Y	Y	Y	Y	N	Y	N	Y	Y	N/A - Single Site Trust (but indicated willingness to undertake a future project)

Trust situated within		Name of trust	Formed	Type: Single Site (SS) or Multi Project (MP)  (details in Key Issue 2 section)	Projects in pipeline? (details in Key Issue 11 section)  (BaR = entry on EH HaR Register 2011)	Willing to take on future projects?  (Yes = 24 Trusts)	Capacity to take on pilot project?  (Yes = 20, from 24 "willing" Trusts)	Aware of a building suitable for a pilot project? (asked only of 24 "willing" trusts)  (details in Activity 4 section)				Local BaR Register to inform future future priorities?  (Source: English Heritage, 2011)	Are there BaR which may be suitable future projects subject to further investigation?  EH HaR Register 2011 entries in trust area not already being tackled (Multi Project trust areas only)
County or Unitary Authority	Local authority							Asset transfer	Housing Association	THI	Enabling development		
Somerset	Taunton Deane	Tone Mill Trust	2007	SS – IB	Y (BaR)							Y	N/A - Single Site Trust
		Wiveliscombe Town Hall Trust	2006	SS – CIVIC	Y							Y	N/A - Single Site Trust
	West Somerset	Dunster Tithe Barn Community Hall Trust	2003	SS – CB	N							N	N/A - Single Site Trust
South Gloucestershire	South Gloucestershire	Kingswood Heritage Trust (with AIBT)			Y (BaR)								
		Winterbourne Medieval Barn Trust	2003	SS – CB	Y							Y	N/A - Single Site Trust
Swindon	Swindon	New Mechanics' Institution Preservation Trust	1995	SS – IB	Y (BaR)	Y	Y	Y	Y	Y	Y	N	N/A - Single Site Trust (but indicated willingness to undertake a future project)
Torbay	Torbay	Lupton Trust	2009	SS – CB	Y (BaR)							Y	N/A - Single Site Trust
Wiltshire	Wiltshire	Bradford on Avon Preservation Trust Ltd	1964	MP - URB	N	Y	D/K	N	N	N	N	Part, and none since unitary formed	No. 17 BaR in Wiltshire, none in Bradford on Avon.
		Melksham Town Trust	1985	MP – URB	N							Part, and none since unitary formed	No. 17 BaR in Wiltshire but none in Melksham.
		Ramsbury Memorial Hall	1996	SS – CB	N							Part, and none since unitary formed	N/A - Single Site Trust



Trust situated within		Name of trust	Formed	Type: Single Site (SS) or Multi Project (MP)  (details in Key Issue 2 section)	Projects in pipeline? (details in Key Issue 11 section)  (BaR = entry on EH HaR Register 2011)	Willing to take on future projects?  (Yes = 24 Trusts)	Capacity to take on pilot project?  (Yes = 20, from 24 "willing" Trusts)	Aware of a building suitable for a pilot project? (asked only of 24 "willing" trusts)  (details in Activity 4 section)				Local BaR Register to inform future priorities?  (Source: English Heritage, 2011)	Are there BaR which may be suitable future projects subject to further investigation?  EH HaR Register 2011 entries in trust area not already being tackled (Multi Project trust areas only)
County or Unitary Authority	Local authority							Asset transfer	Housing Association	THI	Enabling development		
Wiltshire	Wiltshire	Vine Project	2006	SS – MISC	N							Part, and none since unitary formed	N/A - Single Site Trust
		Warminster Preservation Trust Ltd	1987	MP – URB	Y	Y	Y	N	N	Y	Y	Part, and none since unitary formed	No. 17 BaR in Wiltshire but none in Warminster.
		Wiltshire Historic Buildings Trust Ltd, The	1967	MP – C	Y x 2	Y	Y	N	N	N	N	Part, and none since unitary formed	Yes. 17 BaR in County.

Table 5: Trusts, Buildings at Risk, and possible pilot projects

**Index**

BaR: Listed building at risk included on the English Heritage *Heritage at Risk Register 2011*  
 BPT: Building Preservation Trust  
 CAaR: Conservation Area at risk included on the English Heritage *Heritage at Risk Register 2011*  
 RPGaR: Registered Parks and Gardens at risk included on the English Heritage *Heritage at Risk Register 2011*  
 Type of BPT: For an explanation of types, refer to the Key Issue 2 section

From the above data it can be seen that the 24 Trusts which expressed a willingness to take on new projects identified: 11 potential Asset Transfer pilots, 8 potential Housing Association pilots, 8 potential Townscape Heritage Initiative pilots and 11 Enabling Development pilots. 20 of the 24 Trusts indicated they had the capacity to tackle a pilot project; 14 are in areas where a local authority Buildings at Risk Register exists to potentially inform priorities; thirteen are in areas where there are buildings at risk on English Heritage's *Heritage at Risk Register 2011* which could, subject to further analysis and investigation, be future projects. A closer examination of responses from the 4 Trusts that indicated a willingness to take on a new project but did not respond "yes" to having capacity, 2 were not sure they had capacity so were therefore recorded as "Don't know" and 2 indicated a need for capacity-building support.

## **Conclusion**

Building preservation trusts (BPTs) are driven by local communities for local communities and breathe new life into old buildings. They act as catalysts to social and economic regeneration and provide exemplars of best practice in design and conservation work.

Perhaps not surprisingly in a region where volunteering and civic participation is strong, the findings indicate that the region's BPTs are relatively healthy. They have rescued over 120 buildings in recent years and there are 44 projects currently under way (half tackling heritage at risk). New trusts continue to be set up, reserves are in some cases healthy and over two-thirds of BPTs report that they are supported and encouraged by their local authority. However, this research has identified areas which need to be addressed to adjust to significant changes in the BPT operating environment. Dependence on public sector funding for major projects is a significant issue; two of the BPTs' main funders, local authorities and English Heritage, expect grant levels to diminish in the next few years. Levels of sponsorship and local fundraising are relatively low, and may need to be developed in the near future. The study also reveals that the support of local authority conservation staff is vitally important to the success of BPT projects. Numbers of specialist staff are falling faster than the national rate in the South West, another significant change to which BPTs will need support to adapt.

A third of South West BPTs feel that their capacity is strong, possibly due to Trustees' wide range of skills: almost 80% have Trustees with business management, fundraising and project management skills; just over half have Trustees with architectural or design skills, and a quarter have Trustees who are Conservation Officers. However, half the South West BPTs report their capacity is 'sufficient' but could be strengthened; indeed 50% report having a capacity-building plan. Attracting Trustees from a wider range of age groups is likely to be an issue (80% of the South West BPTs have Trustees in the 50-70 years age group); however, only two thirds of BPTs have a recruitment policy in place.

This research comes at a critical time, as challenges for the heritage sector intensify and the policy context for the community and voluntary sector evolves. The study indicates that the region's BPTs will continue to play a critically important role in rescuing buildings at risk; however, this will depend on long-term support, exploring new ways of working, sharing best practice, and in particular developing new partnerships.

## Part 2: Key Issues

### ISSUES RELATING TO TRUSTS

#### KEY ISSUE 1 (relating to Trusts): DEFINING BPTs

##### Introduction

A key issue that has arisen from this (and previous) studies of BPT activity is how a Building Preservation Trust should be defined. Should BPTs be defined by what they themselves have been set up for, by what they actually do, by how others (e.g. funders, UKAPT) choose to define them, or should they be re-defined on the basis that no satisfactory, embracing definition currently exists?

##### Some Existing Definitions

UKAPT: Building Preservation Trusts are driven by local communities for local communities and breathe new life into old buildings. They act as catalysts to social and economic regeneration and provide exemplars of best practice in design and conservation work.

AHF: A building preservation Trust (BPT) is a charity whose main aims include the preservation and regeneration of historic buildings.

The Somerset Building Preservation Trust: works to save the architectural heritage of Somerset for YOU and the nation as a whole. Historic buildings that would otherwise be lost through dilapidation and neglect are restored. They are then converted into a variety of uses

##### Objects

The Charity Commission website makes available the objects of each Trust and these provide a useful starting point for defining the BPT movement.

Four illustrations of Trusts demonstrating the breadth of activities built into their objects are:

##### Cornwall Building Preservation Trust

To preserve and restore for the benefit of the nation property in Cornwall and the Isles of Scilly in the form of Buildings (including any buildings as defined in Section 336(1) of the Town and Country Planning Act 1990) of particular beauty or historic, architectural or construction interest.

##### Arnos Vale Cemetery

A) To secure the conservation, maintenance, operation and management of Arnos Vale Cemetery and its historic buildings, memorials, tombs and other historic physical features for the public benefit and as a cemetery for the decent burial of the dead. B) To secure the conservation and management of the historic landscape, plants and natural life at Arnos

Vale Cemetery for the public benefit. C) to advance the education of the public by making available materials for the study of the lives and significance of those buried in Arnos Vale Cemetery and their monuments by collecting and making available information on the genealogies conditions and lifestyles of the inhabitants of Bristol and related areas through the ages by establishing and managing a museum and display material to demonstrate issues related to the history of Arnos Vale Cemetery and those buried in it and by preparing education activities for schools, colleges, universities and other bodies who wish to visit the cemetery in connection with their programmes courses and syllabuses. D) To secure the proper conservation, management and care of the books of remembrance, historic burial records, cremation records and other archives relating to the Arnos Vale Cemetery for the public benefit. E) To do all such other lawful things as are necessary to the attainment of the above objects or any of them

Bradford-on-Avon:

Maintain, foster and encourage the particular character and scenic and historic and architectural values of buildings and lands in the town of Bradford on Avon and the area adjacent thereto; ensure and promote the integration of new buildings into the area; promote the education of the public by assisting in provision and exhibition to the public of artefacts relating to the history of the area.

Exeter Canal & Quay Trust:

'Preservation of land, buildings and other features around the historic Exeter Quay area and the canal basin and further down the canal, encouraging high standards of architecture in those refurbishment projects. Promoting and supporting musical, artistic, educational and other cultural activities in the area, get community participation in water sports and associated activities there as well.'

These demonstrate that pigeon-holing Trusts into a simple definition that simply encompasses 'rehabilitating buildings' is too restrictive.

Other objects, for example, noted are:

- *'To protect and preserve public rights of way' (Bath Preservation Trust)*
- *'To promote high standards of planning and architecture' (Bath Preservation Trust)*
- *'To collect and preserve items connected with the history of the town' (Beaminster Museum Trust)*
- *'The promotion of industry and commerce by providing office and start-up space' (Beckery Island Regeneration Trust)*
- *'The promotion ... of urban and rural regeneration in areas of social and economic deprivation (and in particular Bridport)' (Bridport Development Trust)*
- *'For the purposes of a community hall... ' (Dunster Tithe Barn)*
- *'To preserve....certain land garden and other buildings follies fish ponds bridges cascades and other structures situate within the former Halswell Park Estate' (Halswell Park Trust)*
- *'To advance the education of the public by the conservation protection and improvement of any part of the physical and natural environment in and around the parish of Hartpury which is of historical significance' (Hartpury Heritage Trust)*
- *'The creation of training and employment opportunities by the provision of workspace buildings' (Lupton Trust)*
- *'To advance education of the public in the arts in Sherborne area by provision of exhibitions, public lectures, workshops, guided teaching and advance public education in heritage of Sherborne House, in particular of mural artist Sir James Thornhill... ' (Sherborne House Trust)*
- *'The relief of poverty amongst poor artists (Spike Island Artspace Ltd)*
- *'The relief in need of persons under 19 by provision of a hostel for temporary accommodation' (The Vine Project)*
- *'To promote and encourage the education and training of stonemasons architects and others concerned with building in the use of Cotswold Stone and other traditional building skills ... ' (Woodchester Mansion Trust')*

## Legal Form

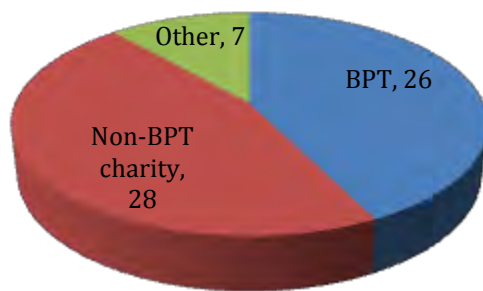


Figure 1: Legal form of Trusts

In terms of legal status, only 26 of 57 Trusts interviewed by telephone regarded themselves as BPTs, compared to 28 who operated as a registered charity but not as a Building Preservation Trust form of charity. Four of those 54 Trusts plus the remaining 3 organisations in the survey stated they operated on a different basis; those falling into this category were still focused on a building project but with a wider remit.

The concept that 'building preservation' sits within a much broader framework of activity is borne out by the range of activities undertaken by BPTs.

## Range of Activities

Building Preservation Trusts in the South West undertake a very wide range of activities. The areas that Trusts concern themselves with range far more widely than rescuing historic buildings, and cover regeneration, social, cultural and environmental issues.

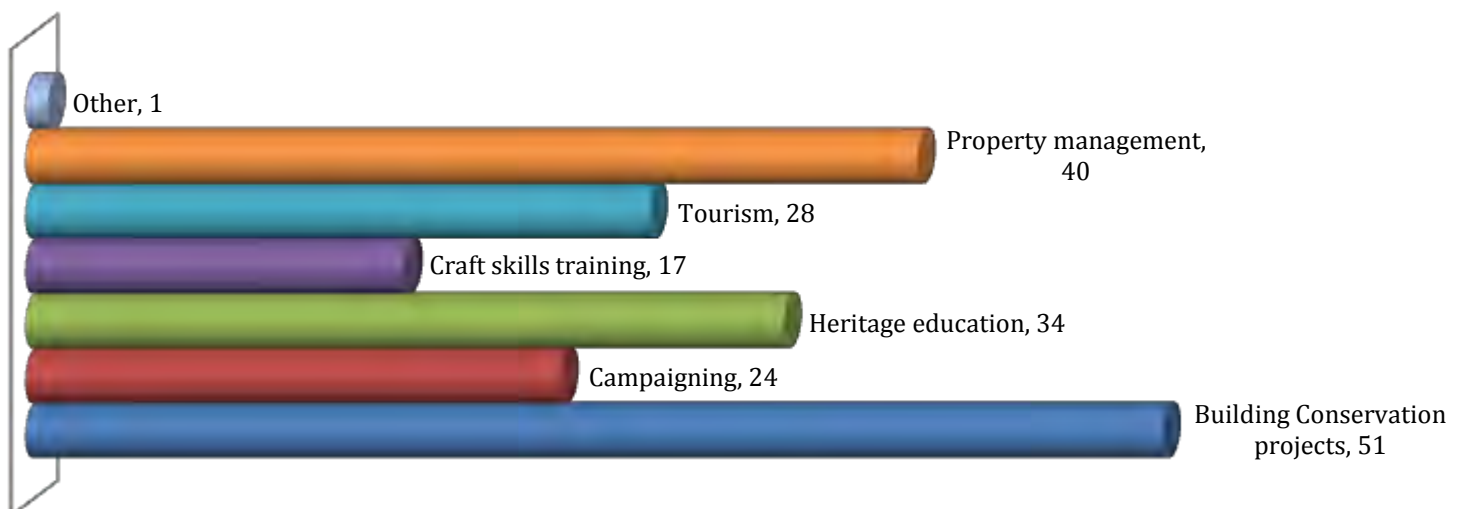


Figure 2: Range of BPT activities

## Project Delivery

Many Trusts are focused, as one would expect, on delivering projects (89.5%). Devon Historic Buildings Trust, for example 'rescue the buildings of Devon for the people of Devon.'

- *objects of charity not purely to preserve buildings*
- *charity to care for restored temple, possibly not a preservation Trust*
- *BPT but with extended objects now to include biodiversity*
- *social enterprise subsidiary dormant at present*
- *objects are to preserve the building for benefit of the community*
- *Lyme Regis Development Trust came out of a community consultation on the planning process in 1996 which was called Planning for Real that enabled local people to identify what the issues were and make suggestions as to how they might be tackled. The development Trust was set up to be the accountable body to put those solutions in place.*

Bridport Development Trust considers its role as providing 'a safe pair of hands for buildings currently in public ownership through local authorities which the local authorities don't wish to continue with'.

### ***Campaigning***

Very nearly half (42.1%) of Trusts are also involved in campaigning activity, demonstrating that many Trusts are engaged early in the process of identifying potential projects, through scrutinizing planning applications, getting involved in Buildings at Risk surveys etc. The Bridport Trust also sees its role as campaigning against developer's plans in the town. The Bristol Visual and Environmental Group has both a campaigning and also a publishing role. Lyme Regis Development Trust is extensively involved in community consultation as part of a local strategic partnership. Bath Preservation Trust undertakes partnership work with other charities linked to campaigning and education, planning type work - regeneration delivery plans, supplementary planning and technical guidance, publication of books. Avon Industrial BPT, Walcot Street Trust, Melksham Town Trust all comment on planning applications; the latter is also supporting restoration of the Wilts & Berks Canal.

It is sometimes said that those who campaign are not always best placed to undertake projects (and vice versa), because the two activities require different skill sets; equally, this raises the question whether Trusts *should* be involved in campaigning work, given that projects are often sensitive; positive relationship building with an owner of a derelict heritage asset might, for example, be compromised and fundraising avenues might be more difficult to pursue. On the other hand, the same drive and determination that is required to campaign on behalf of a building is also needed to drive a project to a successful conclusion. There is perhaps a debate to be had here regarding the overlapping relationship of a number of BPTs and civic societies, where the two roles of campaigning and physical conservation could be apportioned between two organisations.

### ***Commenting on Planning Issues***

Bradford on Avon Preservation Trust sees itself as a 'membership organisation' and comments on planning applications, offers historic building grants, (and performs) civic Trust type functions (e.g. running lectures and historic buildings grant scheme with the Town Council).

### ***Education***

Nearly 60% of Trusts are engaged in Heritage Education, hardly surprising given that education is normally wired into their charitable status; equally, it is a key criterion for Lottery funded projects.

Bristol BPT is involved in raising awareness of heritage assets and where necessary stimulating action to conserve them.

Bristol Visual and Environmental Buildings Trust 'have just put up a 'summer exhibition' about Bristol's earliest central city and suburbs (1500-1700) with information on our rescue of buildings of 1500-1750 date (4 July - 30 Sept 11)'

### ***Skills Training***

Disappointingly perhaps, given the opportunities offered by delivering projects, less than a third of Trusts (29.8%) participate in heritage craft skills training. This was more significant in the past – Avon Industrial BPT ‘grew out of Manpower Services Commission and ran a number of small projects’. Woodchester Mansion is now the exception to the rule – its raison d’être is based on its role as a training centre. Shepton Mallet Amenity Trust is also represented on its Townscape Heritage Initiative which does do skills training. ‘We’re one of the 5 or 6 partners.’ Town Mill Trust has trained volunteers to be millers.

### ***Tourism***

As an enduringly popular holiday destination, nearly half of Trusts (49%) in the South West engage in a tourist activity. Somerset Building Preservation Trust is working in partnership with the Vivat Trust to convert Taunton Castle into holiday accommodation. Somerton Historic Buildings Preservation Trust (only active since August 2010) aims to ‘preserve the centre of the town to encourage visitors.’

### ***Property Management***

As a reflection of the relative maturity of BPTs in the South West, the number of Trusts involved in property management is high (70.2%). Devon Historic Buildings Trust owns Belvedere Tower and runs it as a wedding venue and tourist site. They do not see this as their ‘main business’. Similarly Somerset BPT feels it is stuck with one bit of property management but ‘don’t want it’. One Trust (Rame Conservation Trust) describes itself as a commercial landlord with 40 tenants occupying artists’ studios. Many single building Trusts manage the projects they undertake – as Beaminster Museum Trust commented – ‘property management is not our main function but we happen to have preserved a building on the way – the museum in a listed building’. Hope Community Church now look after a 200 year old Grade II Congregational chapel. (Hotwells and Clifton Wood Community Association originally restored the building and ran it as a community centre, then passed it to the Hope Community Church who took it over in 2000.) Ramsbury Memorial Hall noted that they manage ‘a typical village hall’. Shepton Mallet Amenity Trust manages one historic bridge.

Other activities listed by Trusts interviewed include:

- *Other Heritage Activities*
- *Environmental*
- *Sport and Health*
- *Arts*
- *Social and Economic Regeneration*

## Other Heritage Activities

- participation in Heritage Open Days (Cleveland Pools, Avon Industrial BPT)
- running a social history project to show public how people worked in late 18th century (Coker Rope & Sail Trust)
- giving grants to other historic building conservation projects in Exeter - small grants (Exeter HBT sees its role as 'managing our building and giving grants for the restoration of other historic buildings in Exeter and environs - It has given grants to other Trusts - Poltimore Trust - specifically on plasterwork project, to the Cathedral for buildings in the close and to Devon Wildlife Trust.
- providing historic building plaques. Will fund a couple of those a year. Small conservation projects - e.g. cleaning of bronze plaque, church tower. (Gloucester Historic Buildings Ltd, stating its role had changed from repair and selling on historic buildings to one of monitoring condition of buildings and reporting)
- Wiltshire HBT try and keep buildings at risk list - hard to keep up to date. Have acted in advisory capacity with other Trusts and community groups.
- Plymouth Barbican Association Ltd has established the South West image bank.
- Llanthony Secunda have 'a lot we also want to discover about the site that's unknown at this moment.'
- Totnes PT are interested in landscapes as well as wanting to deliver community design workshops.
- Wiltshire HBT provides advice to other charities and community groups on building conservation matters.
- Somerset HBT runs its annual design awards

## Environmental

- wildlife and bio-diversity conservation (Arnos Vale Cemetery Trust; Hartpur Heritage Conservation). The latter is running an 'Orchard centre project - got funding from regional development agency.'
- Totnes & District PT created a new park in the town garden in partnership with other Trusts, important to improve the general environment.
- generating electricity (Town Mill Trust, Lyme Regis)

## Sport and Health

- promotion of health recreation, including water boat sports (Exeter Canal & Quay Trust)
- centre of equestrian tradition (Wolfeton Riding House Trust)

## Arts

- promotion of arts and cultural activities (Exeter Canal & Quay Trust, Spike Island Artspace and Rame Conservation Trust).
- Sherborne Trust runs a contemporary visual arts programme based on heritage interpretation.
- The Walcot Street Trust aims to retain the character and enhance the Walcot Street area (Bath), particularly recognizing that Walcot Street has a strong creative history with its cultural artist background.

## Social and Economic Regeneration

- LoveBristol works as a regeneration charity with homeless and ex addicts - especially in Stoke Crofts Ward - a deprived ward.
- Lyme Regis has a development Trust which is a community driven organisation that exists to benefit the social, economic and environmental wellbeing of the people of Lyme Regis and surrounding area. It is campaigning to keep the library in the town (not listed but in a conservation area). It is also doing a number of projects with housing and young people involving older buildings - all in the conservation area, one of them being listed. It also owns a business centre in the Victorian former school, located in the conservation area.
- In Swindon, there has been a big regeneration programme in the town centre (which has stalled for some years), showing how heritage can play an important role in regeneration. The Mechanics Institution Trust is both a BPT and a development Trust involved in 'community development and neighbourhood renewal to provide community facilities. Its emphasis is on 'membership, community angle first.'
- Poltimore House Trust was set up to restore Poltimore House for the people of Devon, however it is now seeing this project in a bigger way - involvement of other communities, other kinds of purposes - to get activity on the site rather than simply the fabric of the building. It is therefore working with two volunteer groups from Exeter - Homeless people living and working in hostels, and Amber foundation. It is also working with hospice care. The Trust is aiming to work with businesses - EDF electrical supplier, for example. The local, regional, national strategic aims in which Poltimore House Trust has a role include aims concerning valuing heritage, valuing communities, and active engagement of volunteer bodies in supporting their communities. It has built strategic alliances with: University of Exeter Business School, with a business development project and working with MBA students; Research and Knowledge Transfer, developing joint project on archaeology and history of Poltimore Estate (funded by Arts and Humanities Research Council); University Innovation Centre; Shilhay Community, Exeter, a developing partnership to support meaningful occupation, training and learning for homeless and vulnerably-housed adults; schools and community history and heritage groups, providing learning and opportunities to develop projects related to the heritage of Poltimore House and its estate.
- Stroud Preservation Trust, though currently very focused on current assets on long term leases and Brunel goods shed, in the past was really involved in the regeneration of Stroud. It is called in for all areas of expertise on difficult buildings, although less often now than in the past
- Having refurbished the grade I and a grade II\* buildings, volunteers at the Vine Project are providing neighbourly encouragement for pregnant and abused teenagers or homeless young people.



The actual breadth in the objects of Trusts has undoubtedly allowed for considerable latitude. It has also catered for some change in how BPTs operate. Although 71% of Trusts in the face-to-face sample stated their role had not changed (e.g. 'we review at quarterly meetings, but (our role) hasn't really changed'), three had moved from carrying out building preservation projects to now managing buildings that have been preserved; one stated that it had moved from carrying out building preservation projects to now just campaigning to encourage and support others in preserving historic buildings. Three had changed their purpose away from historic building preservation.

The range of activities undertaken by BPTs is also a reflection of the fact that the movement is well-established in the South West area; over time, some BPTs have inevitably changed their roles.

To conclude Issue 1: There are thus many Trusts in the South West whose remit extends far beyond the simple delivery of projects. Although a building, or a series of buildings might provide the focus or foci for action, a number of Trusts see this as just one aspect of their work, which might include campaigning, commenting on planning applications or providing education and/or tourism facilities. Activities spread beyond heritage into areas that promote environmental, economic and social benefits. Mature trusts also face the challenge of managing buildings – in some cases quite large potfolios.

This study demonstrates that Trusts whose activities include heritage preservation – potentially a very much larger group if one was to include any charitable organisation or Trust that is restoring or managing historic assets – should be embraced as part of the BPT movement. Any charitable Trust that undertakes the repair and restoration of heritage assets, and in particular Buildings at Risk, is eligible for UKAPT membership.

- *Objects initially drafted broadly so that the Trust could respond to changing circumstances - Haven't had a building project for 10 years.*
- *The revolving fund model doesn't work anymore, so the Trust revised articles of association and has taken on a project which will be retained.*
- *Objects revised most recently in 2007 with changes made to remain appropriate.*
- *Hartpury's objects 'included natural heritage. Because Hartpury is such a small area, maintaining interest and competence between projects was a big problem. Not sure whether building preservation Trust was the right structure, not quite suitable for such a small community.'*
- *The Mechanics Institution Trust at Swindon has morphed and 'is now both a BPT and Development Trust. Decided to become a Development Trust and extend powers. Three key areas: (1) classic BPT; (2) community development and neighbourhood renewal; (3) providing facilities for community development with an emphasis on membership and community development.'*
- *'When it started off in the 60s (our Trust) was rescuing buildings which had been written off - part of raising whole profile of conservation in a creative way. Ran in parallel with changes in the law. Trust produced strategy paper 6 months ago; debate is ongoing as to how to remain relevant.'*
- *'The purpose of the Trust remains focused on the renovation of Poltimore House and its restoration to new use. However the Trust appreciates that its role needs to expand to actively develop community engagement in a range of projects, particularly to include learning and training in new skills, and the development of social enterprise to support income generation. A particular example is working with the Shilhay Community, Exeter, whose clients have gained building and renovation experience through regular volunteering at Poltimore House.'*

## KEY ISSUE 2 (relating to Trusts): A NEW CLASSIFICATION FOR TRUSTS

Trusts in the telephone interviews were asked whether they fell into the category of single or revolving fund Trust.



Figure 3: Category of Trust

Exactly one third stated they were a single project Trust. 28.1% considered themselves to be a revolving fund Trust. The differentiation is not always absolute. Some 'ostensible' single project Trusts did consider they might move onto other projects in the future.

*'Concentrating on Walronds, but could potentially take on other projects in the future.'*

In the face-to-face interviews, Trusts were asked 'Did your Trust start as a single project organisation?' 7 of the 24 replied 'yes' – Exeter Canal & Quay Trust, Hartpury Heritage Trust, Llanthony Secunda Trust, Mechanics Institution Trust, Poltimore House Trust, Somerton Historic Buildings Preservation Trust and Walcot Street Trust. Four of these in fact have moved on to undertake other projects, demonstrating that 'hard and fast' classification is never possible with BPTs, and also that adaptation is characteristic of the Trust movement in the South West.

Interestingly, the largest percentage (38.6%) of Trusts considered themselves to be neither single nor revolving fund Trusts.

The answers primarily relate to single project Trusts, whose remits are usually more diverse than those of revolving fund Trusts. This does have important implications in terms of future strategy for UKAPT, given that the 'BPT' aspect of a Trust's work might represent only a small proportion of the overall project.

Where the answers relate to what are essentially revolving fund Trusts, the answers either reflect the fact that the Trust has not yet completed a project (*"the intention was to do more than one project not necessarily on a revolving basis. But haven't completed even one project so giving the*

The responses elicited the following:

- *hybrid of preservation Trust and civic society*
- *museum that's done some repairs to the building*
- *have restored various buildings and have sometimes done it on a revolving basis. Make grants, exhibitions, talks and visits*
- *main project is to restore Dawes twine works, but with social history centre based around flax growing, twine and canvas*
- *do building projects one at a time, but also biodiversity - national collection of fruit trees*
- *regard ourselves as a church, and look after building for long term*
- *regeneration of inner city of Bristol, refurbish building as and when needed*
- *restore Lupton House to its former glory and make it useable by the community-Development Trust*
- *campaigning Trust, mainly focused on Wilts & Berks Canal which runs through Melksham*
- *we're set up to be a preservation Trust for a Mechanics Institution building in Swindon - in private ownership, can't get hold of the building. More recently there's a shop in railway heritage area of the town - owned by the council, won't lease it.*

*answer 'neither'") or a mature stage in the life cycle ("we are a charity that owns heritage properties and rents them") and, connected to that, a situation where retention and management of properties rather than sale has become the norm (thus, for example Cornwall BPT "began as a revolving fund, but our current project we will retain and this is the direction we'll be going in the future - will manage the property and draw an income.") These developments lie at the heart of securing a sustainable future for BPTs – should they become property management agents, with a steady income flow to support a manager and/or project staff or should they seek to 'profit' from delivery of projects on the conventional revolving fund model?*

It is revealing to note that the sector is tending to 'cling' to the concept of a revolving fund model, despite the fact that, as this survey demonstrates, only a minority of Trusts actually fall into this category. This is because practicalities and context tend to dictate that volunteers will on the whole coalesce around single projects that can deliver focused outcomes (church, community centre) and similarly, successful business models employing professional staff also tend to evolve from single centre projects (arts, skills training, social enterprise organisations).

From the above (and with the benefit of studies in other areas), it has become clear that, although each BPT is unique, and with the caveat that classifications should not be over-rigid, there are certain characteristics that can be used to provide a working framework for grouping Trusts. This is applied here to the South West but is recommended to be rolled out across the country, as an aid to shaping UKAPT strategy.

The 57 Trusts included in this study were classified as follows:

## **1. MULTI-PROJECT TRUSTS (24 Trusts)**

A. UK Wide or International (0)

B. Themed (1)

Avon Industrial Buildings Trust

C. County Trusts (4)

Cornwall BPT; Devon HBT; Somerset BPT; Wiltshire HBT

D. Local Area Trusts (1)

Kingswood Trust

- *charity that owns heritage properties and rents them.*
- *main focus is community oriented - provider of spaces for the community, public access, workshops, studios.*
- *more involved in campaigning*
- *to restore Sherborne House and maintain heritage interpretation activity. Activity around the building relates to archived material unrelated to the building. Contemporary visual arts.*
- *contemporary arts organisation - provide exhibition and studio space for artists*
- *objectives about preserving historic building, education, sustaining environment and promotion of art*
- *more concerned with charity and using the building. Have refurbished and conserved but that was only to get it into shape for use.*
- *Just focused on Woodchester Mansion*
- *rural skills centre*

E. Urban Trusts (17)

Bath Preservation Trust; Bradford-on-Avon BPT; The Bristol Buildings Preservation Trust; Bristol Visual and Environmental Buildings Trust; The Exeter Canal & Quay Trust; Exeter HBT; The Frome HBT Ltd; Gloucester HBT Ltd; LoveBristol; Lyme Regis Development Trust; Melksham Town Trust; Plymouth Barbican Association; Shepton Mallet Amenity Trust; Stroud PT; Totnes & District PT; Walcot Street BPT (Bath); Warminster PT

F. Village Trusts (1)

Hartpury Heritage Trust

**2. SINGLE BUILDING OR SINGLE SITE TRUSTS (33 Trusts)**

(Note: The Memorandum & Articles of Association of some of these Trusts include a wider remit, but they are included here as they have been established *primarily* to focus on a single building or site.)

A. Cemeteries (2)

Arnos Vale Cemetery; Ford Park Cemetery

B. Ecclesiastical (3)

Barnstaple Buildings Preservation Trust; Llanthony Secunda Priory Trust; Hope Community Church

C. Community Buildings or Projects (10)

Cullompton Walronds PT (also tourism); Dunster Tithe Barn Community Hall Trust; Lupton Trust; Ramsbury Memorial Hall; Rame Conservation Trust; Spike Island (Artspace) Bristol (also international remit); Trenance Cottages, Newquay; Vine Project; Winterbourne Medieval Barn Trust; Yarner Trust

D. Town Halls and Civic Buildings (4)

Bridport Area Development Trust; Great Torrington PT; Somerton Historic Buildings Preservation Trust; Wiveliscombe Town Hall Trust

E. Museums (2)

Beaminster Museum Trust; Coldharbour Mill Trust

F. Piers (2)

Birnbeck Regeneration Trust (Weston Super Mare Pier & Island); The Swanage Pier Trust

G. Lidos and Swimming Pools (1)

Cleveland Pools Trust

H. Industrial Buildings (4)

Coker Rope & Sail Trust; New Mechanics Institution PT; Tone Mill Trust; Town Mill Trust, Lyme Regis

I. Country Houses and Estates (5)

Halswell Park Trust; Poltimore House Trust; Sherborne House Trust; Wolfeton Riding House Trust; Woodchester Mansion Trust

### 3. MISCELLANEOUS TRUSTS

None

Single Site/Building Trusts outnumber revolving fund Trusts, although it should be borne in mind that some of the single building Trusts (e.g. Great Torrington) have potentially a wider remit enshrined in their Memorandum & Articles of Association.

Of the revolving fund Trusts, there are 5 Trusts which embrace areas based on administrative divisions – one of these, Avon Industrial Buildings Trust is also themed and concentrates on industrial buildings.

The classification of revolving fund Trusts depends on geographical remit and, as these tend to remain relatively static over time, they should not fluctuate or change wildly in the future. In the face-to-face interviews, four Trusts had considered changing their geographical remit but in the end had decided not to change:

- *Forest of Dean district council suggested we might extend this existing Trust to cover Forest of Dean. Decided not to because Hartpury Heritage Trust is geared to small community. Setting up a new Trust. Support other communities by advice and example.*
- *North Somerset. But would be difficult to cover because Somerset BPT is Somerset County based. Could be part of building awards scheme possibly as well as Exmoor National Park.*
- *Might go 10 miles beyond Stroud once Brunel engine shed has been dealt with.*

Only one Trust had slightly changed its geographical remit, but not sufficient to alter its classification:

- *Started with historic area of the quayside, then added canal basin plus two canal-side pubs.*

Of the County Trust (all early foundations), Somerset, Devon and Cornwall are actively pursuing projects, as well as providing other services. Wiltshire is reserve-rich and although it has undertaken several detailed studies in recent years it has not as yet been successful in taking these forward. A review of the Dorset Trust will be undertaken as an outcome of this study: it was understood they have wound up and transferred to the Vivat Trust but the Charity Commission data suggests they are nominally still active. Gloucestershire lacks a County Trust entirely.

A striking feature of the South West (compared to e.g. the East Midlands) is the quantum of Trusts focused on urban areas. This is despite the fact that the region has the highest percentage of rural land of any English region, with around three quarters of the total land area being part of an agricultural holding. The South West also has the lowest percentage of people living in urban settlements of any English region (67%; England as a whole 82%). It has the most people (and highest percentage of people) living in villages, hamlets or isolated dwellings (17%; Eng. 8%) and in remote locations (4%; Eng. 1%). Despite this, most towns and cities in the South West area have a Trust serving all or part of their historic cores. Frequently the Trust's remit also included the hinterland of the town up to a 20 mile or so radius (e.g. Beaminster); in many cases this was quite vague. Bath Preservation Trust is a big player but its core business no longer focuses on revolving fund activity. There are a number of area specific Trusts such as the Exeter Canal & Quay Trust and the Plymouth Barbican

Association Trust, both hold large managed portfolios and have healthy reserves. The Lyme Regis Development Trust is capitalising on its position within the Jurassic Coast World Heritage Site and manages a number of historic properties (Lyme Regis is also the focus of a new project by the Landmark Trust). These latter three examples (Exeter Canal & Quay Trust; the Plymouth Barbican Association Trust; and Lyme Regis Development Trust) are not currently UKAPT Members; it would enhance the local support network of charities with similar interests if organisations such as these were to join UKAPT. Equally, there may be scope for a number of market towns with their hinterlands of villages, farms and hamlets to adopt the Lyme Regis Development Trust model of bringing together a variety of partners with wider social and economic regeneration objectives.

The level of project activity demonstrated by other urban Trusts is disappointing, and although some have reserves there are actually few 'live' projects underway. (Stroud Preservation Trust has a managed portfolio and now proves the exception to the rule, featuring in the 2011 English Heritage Angel Awards with the Brunel Goods Shed).

There is only one village Revolving Fund Trust – Hartpury - clearly a very interesting model with a successfully managed portfolio of buildings.

Analysis of accounts demonstrate that a number of Revolving Fund Trusts have not been active for a number of years.

The single site Trusts are evidently all at different stages in the project life-cycle – Dunster Tithe Barn is complete, whereas Trusts have only recently been formed at Somerton and Bridport to tackle important civic buildings and it tends to be these Trusts which are more heavily involved with community engagement (Walronds, Lupton etc.) and appear to be building strong cases for support. (The concern remains of what happens to the skills and expertise once the project has finished). Single Building PTs cover a very wide range of building types. Projects involving cemeteries appear to be particularly successful and both examples in the South West yield income by continuing the purposes for which they were established. Also quite strongly represented in the South West are Country House/Estate Trusts.

There is also the miscellaneous group of Trusts whose activities include heritage/building preservation – potentially a very much larger group if one was to include any charitable organisation or Trust that is restoring or managing historic assets.

This classification provides a framework to consider for introducing cross-cutting networking opportunities on the new UKAPT website, so as to put Trusts in contact with other Trusts in the UK with similar profiles and aims.

To conclude Issue 2: Although there is great diversity in the range of Trusts operating in the South West, they can be classified into multi-project and single project Trusts, with a subordinate range of types under each of these two categories. Of the multi-project types, County Trusts have a reasonable spread across the region (Dorset is the exception), and mature, urban trusts are particularly prominent in the South West, although significantly, a high proportion of these have been inactive in terms of projects for a number of years.

### KEY ISSUE 3 (relating to Trusts): DEFINING AND MAXIMIZING SUCCESS FACTORS

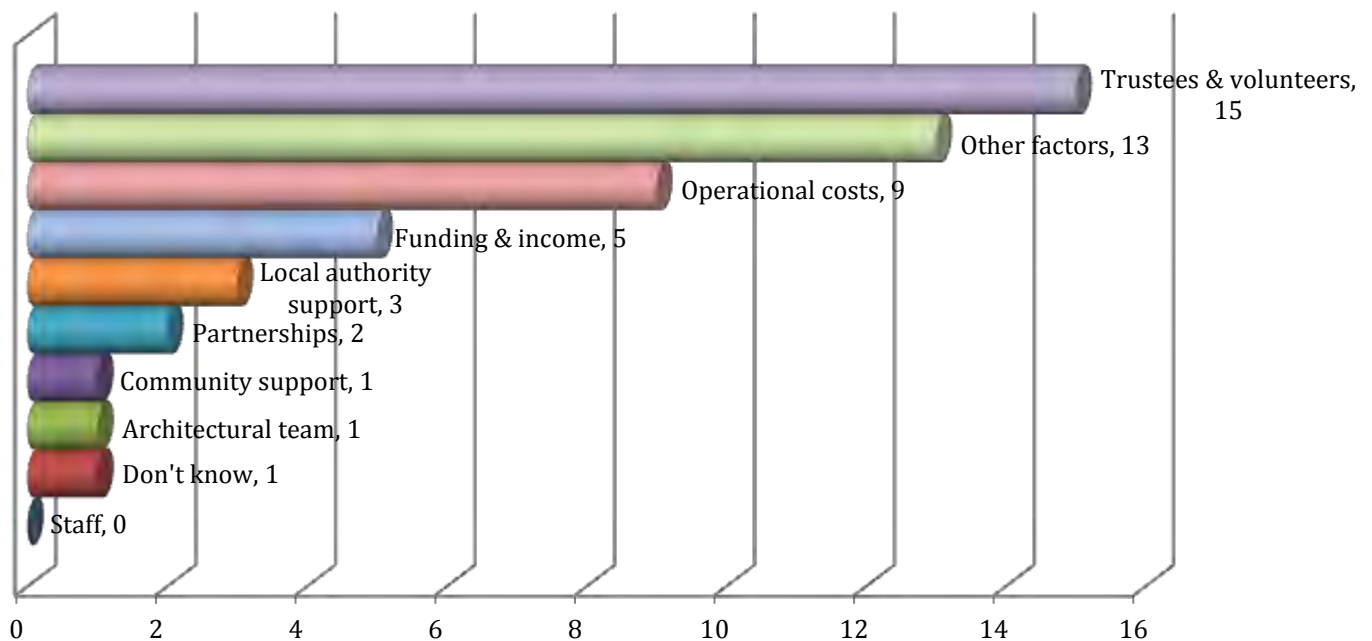


Figure 4: BPT strengths

When asked to identify the strengths for their operational model, (more than one answer allowed) 15 Trusts in the face-to-face interviews considered 'our Trustees and volunteers' to be a key strength, 9 Trusts thought their operational costs were a strength, 5 considered 'our funding and income streams' were paramount, 3 counted local authority support to be a vital strength, and partnerships were quoted by 2 Trusts.

Nobody listed their staff to be a key strength, reflecting the volunteer emphasis of Trust activity in the South West

More weight needs to be given to these positive attributes when publicising the work of Trusts, and when proposing a realistic strategy for encouraging better and more targeted support for Trust activity. These aspects are explored further in Part 3.

#### Other factors included:

- *enthusiasm, very knowledgeable about industrial archaeology*
- *more broadly based than just building preservation which has allowed the Trust to adapt without changing objectives. Responsive to what now needs doing here - emphasis has shifted away from building preservation.*
- *access to people experienced in this area of work.*
- *money in bank. Good contact with other organisations.*
- *Trust has funds, Trustees work for nothing, can make projects profitable. Use direct labour. With empty buildings make it a little bit habitable and get student or two to live there. Works for small projects, domestic size one at a time.*
- *just revised the articles of associations and removed some of the weaknesses. Removed all membership from the Trust. Now just the board of Trustees. Refocused on building a team of Trustees who are actively involved in the core business of restoring, protecting, acquiring, reusing historic buildings. Membership activities were a distraction for Trust currently. Reduced members on the board from 20 to 15 - board meetings are smaller, tighter.*
- *persistence, active participation, depth of experience in various professional fields. Stress (from the outset) in involving and informing the community.*

To conclude Issue 3: Most Trusts focused on their 'internal' attributes such as trustees and staff, operational costs and funding streams as being their key strengths. Partnerships and effective community engagement were not so prominent, perhaps reflecting the need for the BPT movement in the South West to develop stronger external links to ensure growth and provide greater operational stability.

- *money in bank. Core funding. Devon has a lot of good properties to repair. Immense experience gained by Trustees.*
- *longstanding local knowledge, good networking*
- *village community - can inspire people very easily.*
- *have demonstrated that by putting a Trust together you can start turning a site round. Before Trust and building of college, Llanthony Secunda Priory was subject to vandalism every weekend.*
- *very flexible, innovative, embrace a lot of new ideas*
- *example of participative democracy. Enable people to work in a structured way to make positive things happen. Fleet of foot, demand responsive.*
- *survived for 15 years on next to no money, largely money generated through own activities and development Trust work providing support and facilities for communities.*
- *got a project we believe in. House does inspire people. Dedication and commitment*
- *councillors as Trustees, keeps council informed. Offer internships - education.*
- *breadth of expertise*
- *support staff well. Connections. Clear management. Risk analysis. Well organised.*
- *informal, haven't got a lot of formalised procedures. Continuity of Trustees*
- *we're very realistic - not going to proceed unless there's a point in doing it. Waiting for project, small number of Trustees.*



## KEY ISSUE 4 (relating to Trusts): DEFINING AND OVERCOMING BARRIERS

Barriers identified by this research are ranked in the following order of significance:

- (i) Governance, Personnel and Culture
- (ii) Strategy
- (iii) Finance
- (iv) Trust Model
- (v) Partnerships
- (vi) Context
- (vii) Profile
- (viii) Experience
- (ix) Geographical Imbalances
- (x) Support Structures

Barriers stated by survey respondents include the following explanations.

### Governance, Personnel and Culture

- *not enough active Trustees*
- *Trust revolves around one person*
- *short of time. If we had more time could be more proactive. Not in a position to employ anyone.*
- *not very well resourced, dependent on volunteers, hard to manage volunteers*
- *the Trust has yet to establish an effective model of operation with the separate Friends of Poltimore House organisation, which is supportive in maintaining contact and interest of wide range of individuals, and in volunteering to do maintenance and renovation tasks in the house and grounds.*
- *need more personnel resource*
- *City council's culture informs Trust culture, therefore tend to have the same mindset, which is not necessarily how the Trust should operate. Hope that independent Trustees counter that by challenging the assumptions we make.*

### Lack of strategy

- *knowing where to focus our resources and effort – prioritisation*
- *the weaknesses of the “model” could be described in terms of focus: insufficient focus on the long-term goal of raising large-scale funds, which affects both Trust and Friends, though in rather different ways. The Trust needs to focus on managing funds as well as fundraising - grants and events. This is being addressed strategically, but involves some culture change.*

### Finance

- *lack of money. CWPT has to continue to involve more people and raise more money.*
- *not guaranteed core funding stream. Not getting interest on money in bank. Many rural buildings with no end use.*
- *difficulty in finding grants for certain projects which fall outside remit of grant making agencies. Long development programme in some cases.*
- *access to straight forward funding without bureaucracy*
- *would like to have zero rated VAT for listed buildings.*
- *anything which causes a hiccup in the cashflow is a problem, in some cases a really serious problem.*

- *core funding, ability to maintain level of support given by some of the statutory authorities - HLF, EH etc*
- *rapidity of access to funding*

### **Trust Model**

- *outdated model - revolving fund idea doesn't work*
- *sustainability - dependency relationships e.g. grant funding need to be replaced by models which will generate revenue*

### **Partnerships**

- *can pose problems when working in partnership to be so flexible and innovative. Charity model not built for flexibility and innovation.*
- *we haven't organised ourselves to be representative of local community.*
- *Inability to persuade local planning authority to take action on CPO because of the costs and complexity of that and lack of council resources. Potential loss of help from Wiltshire Council which we currently get.*
- *need better relationship with council - recognising how the Trust could help in looking after heritage assets and encouraging creative activities in Walcot Street area.*

### **Context**

- *building conservation is less high profile than it was some years ago - however battles still need to be fought.*

### **Profile**

- *lack of public profile - don't always know about buildings at risk.*
- *generically, being seen as relevant - being clear what BPTs are. Relevance and profile.*

### **Experience**

- *Trust is newly set up and needs to gain experience. Seeking to acquire a building from a now bankrupt vendor.*
- *Still on initial project so no experience of revolving fund structure.*

### **Geographical Imbalances**

- *where the South West features in government policy as a whole - may lose out on government initiatives.*
- *distance from city and major conurbations – South West fairly forgotten about.*
- *size of South West area. Distance from London.*

### **Support Structures**

- *access to the right advice.*
- *geographical size of South West area is a problem for meeting attendance.*

On the more positive side, three Trusts didn't consider there to be any problems:

- *no weaknesses, easily affordable by any standards.*
- *have removed weaknesses*
- *no weaknesses*

To conclude Issue 4: Trusts identified a range of barriers in delivering projects and undertaking further heritage-related activities. Three key issues to emerge were problems with succession of Trustees, lack of strategic and business planning, and maintaining a viable operating model. These barriers were taken into account when framing the recommendations for activity plans.

## KEY ISSUE 5 (relating to Trusts): MATCHING CAPACITY WITH OPPORTUNITIES

Opportunities here relate on the one hand to potential projects in the shape of Buildings at Risk that might be acquired and returned to use, and on the other to programmes and funding streams which might promote BPT activity. There tends to be an assumption that the two aspects are closely aligned, but it is clear that external agencies and Trusts themselves often either under or over-estimate their capacity to address projects. It is understood that one aim of the Regional Support Officers employed by the Architectural Heritage Fund is to work with English Heritage to prioritize a Buildings at Risk Programme – this section is therefore designed to assist in the process of analysing to what extent BPTs can play a key role in delivering that programme.

### Projects in the Pipeline<sup>3</sup>

The first step is to define the scope of work currently being undertaken by BPTs in the South West.

44 projects involving over 50 historic buildings have been identified through this study (see the section headed “Key Issue 11” and Table 5: “Trusts, Buildings at Risk, and possible pilot projects” in Part 1). They are, of course, at different stages of development; 3 projects were on site at the time of conducting the research (Avon Industrial Buildings Trust, both projects; and Exeter Canal & Quay Trust).

Should all current projects be completed, this will ensure at least **21** buildings will be removed from the English Heritage *Heritage at Risk Register 2011*, and over 50 historic buildings brought back into re-use.

### Trusts without a current project

The second step is to assess whether the remaining Trusts without a current project are still active and whether they have spare capacity to undertake projects. There are 20 Trusts that were included in the telephone interview sample but who do not appear in the list of active projects:

- *Beaminster Museum Trust – actively managing Museum*
- *Birnbeck Regeneration Trust – ‘Birnbeck Trust has been in limbo since 2008. It was formed with a view to taking over Birnbeck Pier, but it was bought commercially. So the Trust set up but hasn't been able to move forward on this project’*
- *Bradford on Avon Preservation Trust – civic society*
- *Bristol Visual & Environmental Buildings Trust BVEBT – actively campaigning*
- *Coldharbour Mill Trust – actively managing Museum*
- *Dunster Tithe Barn Community Hall Trust – managing successful community facility*
- *Ford Park Cemetery Trust – actively managing cemetery*
- *Frome Historic Buildings Trust – attending UKAPT meetings*
- *Gloucester Historic Buildings Ltd – has paid p/t member of staff – Trust is currently more involved in monitoring and blue plaques etc*
- *Halswell Park Trust – actively managing asset*

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<sup>3</sup> For the definition of “pipeline” projects used in this report, please refer to the footnote in the section “Part 1: Context”.

- *Hope Community Church – active community facility*
- *Melksham Town Trust – actively campaigning*
- *Plymouth Barbican Association Ltd – actively managing photo archive*
- *Ramsbury Memorial Hall – actively managing facility*
- *Shepton Mallet Amenity Trust Ltd – operating as a civic society*
- *Spike Island Artspace Ltd – actively managing facility*
- *Town Mill Trust – actively managing facility*
- *Vine Project – actively managing facility*
- *Walcot Street Trust – Not currently campaigning, had higher profile several years ago.*
- *Yarner Trust – actively managing facility*

As can be seen from the above, it would be misleading to discount those Trusts that do not have projects in the pipeline as being ‘inactive’. Most of the above projects, particularly those set up to tackle single sites, have simply moved beyond the ‘bricks and mortar’ phase. Others are active in the field of heritage preservation. The following questions therefore need to be addressed.

- a) At what point does a Trust move beyond the definition of Building Preservation Trust (and therefore a need to have access to UKAPT advice and support)? This may at first sight be obvious in the case of single building Trusts where a project has been completed and an asset created, but even here it is clear that some so-called single site Trusts may still go on to tackle other buildings. Equally, the major concern about transfer of skills means that such Trusts could in fact be entering a ‘mentoring’ phase where they can pass on advice and expertise to fledgling Trusts.
- b) Equally, should a Trust that has currently moved away from Building Preservation Trust activity (e.g. into a solely campaigning role) be excluded from the definition of a ‘Building Preservation Trust’? These Trusts may re-activate as BPTs in the future; in the meantime, what support and advice should they have access to from UKAPT?

## **Capacity**

The third step is to assess whether all the Trusts listed have the capacity to deliver this portfolio. (This is addressed in the ‘Project’ Section)

## **Pilot Initiatives**

The fourth step is to assess whether the proposed pilot initiatives can help address some of these buildings, or whether they would require new Trusts to be formed to take them forward. If so, is it reasonable to expect new Trusts to be formed? Alternatively, is it likely (or preferable) for other vehicles or mechanisms to be used to address the pilot initiatives. (This is addressed in the ‘Pilot Initiatives’ Section.)

## **Analysis**

The fifth step is to analyse whether Trusts have the capacity to deliver the current portfolio of 44 projects *and* move onto other projects.

It is clear from the study that some Trusts will not be highly active in the future. A number have already completed their projects. Others feel that, in their present form, they have met the purpose for which they were established:

- *limited number of possibilities in the village of Hartpury.*

An assessment of future capacity needs to be realistic and take account of the fact that many Trusts have either completed their main projects, are already involved in major projects which could take a number of years to complete or have stalled or changed their objectives.

When asked about future plans, Trusts responded with:

- *Focused on preservation of cemetery, could be restoring listed monuments and other buildings within the cemetery. Develop resources and ensure sustainability of Arnos Vale site*
- *Will change in the future - possibly more to do with publicity rather than restoring buildings (Bristol Buildings PT)*
- *no plans at present. Focus is this particular building*
- *just local history museum in better state of repair*
- *Trust will wind up at the end of the year unless called into partnership with present commercial owner of pier*
- *want to see it run as community pool, staffed and run as a community asset. Educational facility and general recreation. Form a board from local people to run the pool*
- *make this building attractive to visitors - visitor centre. This will take about 5 years. After that will reconsider plans.*
- *next project to install a turbine to generate electricity, then create studio space and workshop space on another floor of main building.*
- *continue to manage the building. Not looking to get involved in any more projects*
- *when funding permits will undertake restoration of some of the monuments*
- *plans are just to carry on as they are now - meet 6 times a year and contribute to things like plaques and other small projects*
- *ongoing project - ongoing maintenance. Continue using and looking after*
- *promote Wilts & Berks Canal project, continue to comment on planning issues*
- *plan to manage the building and make it a success. Long process.*
- *rolling out to the other satellite buildings, management of the current site*
- *continue to run the building, ongoing maintenance*
- *continue to manage the bridge*
- *will continue an involvement with the interpretation programme and public access*
- *exhibit national and international artists, provide studio space for local artists, no plans to expand*
- *ongoing thing for next 30 years - constantly replacing parts of the pier e.g. piling on the pier. Replacing big piles. Spending money all the time.*
- *don't know how it will progress. Project in the balance - planning first then funding*
- *solar energy on malt house, raising funds for ongoing maintenance*
- *run the building with local organisations coming in. Exhibitions of local artisans, changing exhibitions, running the tea rooms. Sustainability. Glimpse of the past but giving the place life for the future. Work with schools on the history and heritage and environment of the Trenance Valley.*
- *just getting over last one. Just to run the charity.*
- *don't know.*
- *Trustees see themselves as running the complex in the future. Ongoing management structure of project.*
- *simply to run the building*
- *to provide education to general public including children of what a riding house building was like and what it did.*
- *ongoing project, might always be ongoing.*
- *re-roof the barn to include toilets and reception area*
- *retain ownership*
- *to keep looking after this temple, negotiating with planning authority to restore landscape garden - two listed monuments in the garden. Currently in private ownership. Planning authority not very helpful at present.*
- *keep the building in a good state of repair*
- *may be an active partner with another Trust but focused on managing existing buildings in ownership. Revolving Trust stopped in 1980s and maintaining buildings now. However has a current building project on building which was leased to Trust*

- *not main aim - main aim is local history museum*
- *continue to work with local authority on planning applications. Exhibitions, talks, trips.*
- *current project is going to use up most of the reserves. Don't know if there will be any future plans - may have to wind up the Trust. Carry on in the meantime. Also develop friends of the Trust and improve publicity.*
- *current project will run to the end of 2012. No further resources to take another project on - only three active Trustees running the current project. With more resources could run projects concurrently.*
- *if a millionaire came along and wanted to buy and repair the house would probably pass the project on, so long as quality of repair was ensured with public access. Would change into management board and keep ownership of building in that sense.*
- *run out of steam and goodwill because nothing's happening.*
- *Trustees would be happy to just complete this project*
- *remit to preserve mill site and make it available to the public*
- *Dunster tithe barn only - Somerset BPT were project managers*
- *enough to deal with in cemetery*
- *quite a lot of elderly members - a lot of work these projects. Not the enthusiasm to go ahead with big projects.*
- *one's enough for the time being but are set up as a revolving Trust*
- *only intend to preserve current building and use for community*
- *only concerned with Lupton House*
- *single building Trust for Poltimore House*
- *Trustees just involved in running and managing Ramsbury Memorial Hall*
- *no appetite for further projects*
- *focus was to look after this one building. Have more or less achieved that. Focus on public access programmes, not on further preservation. Will probably change mem & arts*

- *not a Building Preservation Trust, just based in Bristol*
- *only concerned with pier and replacing old buildings on part of pier*
- *will run buildings after completion*
- *only concerned with mill site just finished another building on site*
- *only set up for Trenance Cottages*
- *perhaps in the future, but not for the time being*
- *possibly, currently involved with Civic Trust in trying to acquire Warminster Old Town Hall, but this will be passed to a Town Hall Trust if acquired. Depends then on future interest in the Preservation Trust whether it continues.*
- *only set up for this particular set of buildings*
- *charitable remit solely for town hall*
- *only set up for preservation of one building*
- *Trust specifically to preserve Woodchester Mansion. Once preservation of mansion is complete then Trust would be disbanded and much larger organisation would take it over as going concern*
- *focused on present activities, rural skills centre*
- *the present Trustees don't have capacity, interested in one particular building at present - old Catholic church. (However the Trust's vehicle could be used as legal umbrella)*
- *main project is to get current project up and running. Could do other projects in future but not for quite some time.*
- *focused more on commenting on planning, attend Wilts & Berks Canal Partnership meetings, but would not lead on this project if it went ahead*
- *we think we're working at limits of our abilities. Property management generates rental income which is recycled and used for property maintenance, building preservation, building improvement, but also grant giving. Capacity limited by revenue streams that property portfolio brings in. Don't seek funding from elsewhere.*

This realism should be set against the overall results derived from the telephone interviews. When asked whether Trusts would be willing to undertake projects in the future, 51% said 'yes' – this in itself is surprising given, as we have seen, that a high percentage are focused on single buildings.

So, while diversity is a key characteristic of Trusts in the South West, there is also the sense that some Trusts have capacity to do more:

- *'We could do various things according to our objects including education, could do campaigning but not presently'* (Bristol Buildings PT)
- *Exeter HBT considered itself 'to be a buildings preservation Trust for Exeter, but haven't succeeded in getting another project for a while.'*
- *'Haven't done a large project for quite a while.'* (Gloucester Historic Buildings Ltd)

There are many newly retired people who could help, but people don't realise the value of this type of activity.

Even more positively, there is no lack of appetite for undertaking further projects amongst a selection of Trusts



Figure 5: Does the role of your Trust remain appropriate?

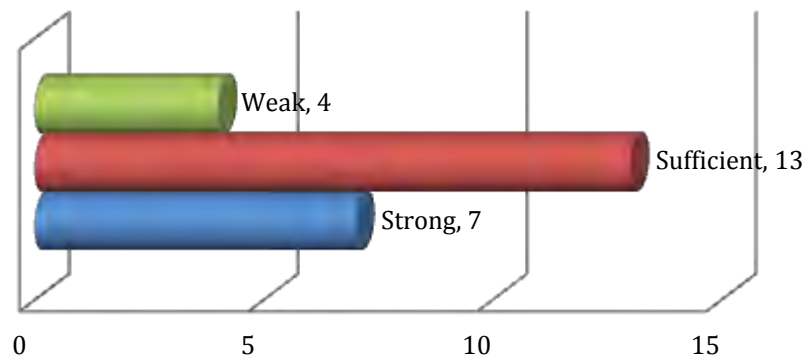


Figure 6: How do you rate the capacity of your Trust?

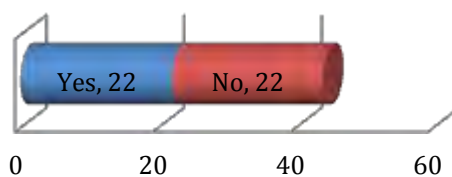


Figure 7: Does your Trust have a strategy to increase capacity?



These Trusts are looking to extend themselves in the future:

- *will increase capacity if we manage to acquire building - currently trying to acquire church on St Michael's Hill II\* building empty for 10 years. Are in touch with local amenity society in Kingsdown as it would have community uses. Address the most pressing important listed buildings without our capacity in the area. Can only take on smaller projects. Will try and help other Trusts.*
- *could widen out and look at other sites in Gloucestershire as and when ready. (Llanthony Secunda)*
- *there are still buildings at risk in need of rescue, so role of Trust remains appropriate*
- *we have made ourselves more appropriate by modernising and changing objects.*
- *need to address inner city regeneration, alleviating poverty*
- *now becoming more organised - moving from kitchen table to board organisation.*
- *one Trust saw its role enhanced 'with more and more people unable to restore heritage buildings because of the harsh economic climate.' The Trust still has good links with the major fund raising bodies to enable the programme to continue.*
- *Trust will only be active when there is a suitable project*
- *could work with many different types of organisation e.g. development Trust, CIC. Could support local authority action on repairs notices or CPOs, which we have done in the past - under different local authority structure.*
- *conservation and reuse of historic buildings is central and local government policy which the Trust can help deliver.*
- *WHBT can also assist in rescuing buildings-at-risk which for English Heritage is a performance indicator.*
- *we give grants - contribute to other schemes. World Heritage Enhancement Fund. Fund either for contributions to community projects as well as small projects c. £30-40,000 pot of money. Have an administrator within the Trust who manages projects, others in partnership with council. Canal work being managed by British Waterways. Different projects managed in different ways. Continue along those lines.*
- *focused on the current project. Potentially could take on heritage assets from South Gloucestershire (Willsbridge Mill - local authority owned)*
- *finish current two projects and do some more. Talked to Sustrans (bicycle tracks) - tying together heritage and bicycles - making cycle trails. Five small projects - may get involved.*

- *may get involved in Calendar project. Possible lean-to at Barton Farm, footbridge in town.*
- *open to other projects. Give grants.*
- *get the Trust on firm footing in terms of resources - personnel and skills - over next 6 to 12 months to be in a position to take on some of the opportunities which are presenting themselves.*
- *see through current project - Duchy Palace. Then increase level of activity, build a professional organisation able to deliver more projects. Move away from grant dependency.*
- *continue generally with current level of activity but with more possibilities through improved facilities and the partnership with Vivat Trust. Deliver current Walronds project.*
- *continue to rescue buildings or be a catalyst to get someone else to do it. Three current projects. Hope to make some money on one of the current projects to help other projects. Have 34 more years of lease on Haldon Belvedere then need to consider the future.*
- *complete the canal basin scheme within next 4-5 years. Thereafter will revisit aims and objects again. May look at areas in Exeter ship canal and areas of river frontage.*
- *continue to run 21 the Mint, renew leases, looking for next building*
- *could undertake another building project if one came along, otherwise continue with small projects.*
- *marking time, from time to time see something that could be done. Natural heritage has given us something to do to maintain interest. Potentially tithe barn will be put on the market at some point.*
- *continue with current project. Need to turn the extant buildings back into a use that generates cash and provides the Trust with core income. At some point in the future could look at projects in other parts of Gloucestershire.*
- *if successful with Carriage Works then would like to take that model forward to other sites, take financial investment partnership forward. Would look at other inner city projects and replicate.*
- *to be sustainable, to be able to be responsive to the needs of the local community, act as a catalyst for regeneration*
- *lobbying around Mechanics Institution - position ourselves as a community ownership solution. Engage new members. Undertake public engagement projects as stepping stones to get into capital projects.*
- *see Somerton Old Town Hall to fruition then continue with other projects*

- *actively trying to sell leases to release some capital money to build reserves. Trying to recruit more Trustees. Keen to reconnect with district council conservation officers, start developing new projects.*
- *to look for opportunities of suitable buildings and suitable spaces - happy to take on landscape places as well as building spaces. Also commenting on planning applications.*
- *pursue possibility of mortuary chapel project. If the Corn Market project comes back again as a possibility, will pursue. Stalled also for the council.*
- *proceed with Warminster Old Town Hall project, try to acquire. May consider other projects with younger Trustees.*

- *re-establish links with local authority - build a good working relationship with Wiltshire Council (new unitary authority) Talking with development Trusts. Trying to make it known to others that if they have a particular problem that we can assist with we're happy to look at that. Raise profile.*
- *looking at different ways of working in addition to restoring buildings*
- *facilitating interpretation of Jurassic coast world heritage site through a study centre. Potential economic driver for Trust in the future.*

Again, when Trusts were asked to assess whether they had a role to play in delivering national, regional and local strategic aims, 83.3% agreed with this statement (only two thought not, and 2 didn't know). Lack of strategy (see Key Issue 8 below) did often correlate with a less coherent alignment with delivering agendas.

All evidence points to the fact that there is good scope for undertaking projects in the South West. The size of the present portfolio suggests that all efforts should be channelled into delivering this substantial body of work. Once completed, the key considerations, considered later in the report are: whether existing Trusts in the South West have the capacity and capability to undertake further work, or whether 'new' vehicles should be found to tackle Buildings at Risk.

To conclude Issue 5: The quantum of projects being pursued by Trusts in the South West is impressive, and assisting BPTs to deliver these projects should be a major focus of capacity building in the region. It should be recognized too that certain Trusts are not in a position to take on additional projects; nevertheless there is an appetite amongst the more proactive trusts to undertake further activity.

## KEY ISSUE 6 (relating to Trusts): MAINTAINING & DEVELOPING STAKEHOLDERS

While some elements of BPT activity, such as number of projects undertaken or in the pipeline or numbers of supporters, are measurable, other areas – such as defining how others perceive the ‘worth’ of BPTs, are less so. All Trusts (except 2 returning a ‘don’t’ know) when asked in the face-to-face interviews to identify ‘goodwill’ amongst their stakeholders and supporters identified particular areas for comment:

- *Some of the councils are more and more aware of what we're doing and fairly supportive over the last few years. Particularly good relations with South Gloucestershire Council*
- *500 membership - symptom of goodwill. Well attended events. Comment on planning applications so depends on whose side you're on.*
- *Slowly increasing amount of goodwill, particularly from councils involved. Trust gives a consistent message which increases confidence in what we're trying to do.*
- *City Council, local community, local architects*
- *Contacts with many amenity societies.*
- *A lot of goodwill. Goodwill from Cornwall Council and Cornwall councillors. Key officers within the council are supportive. English Heritage. Prince's Regeneration Trust is a good partner - mentoring and guidance.*
- *Goodwill to Walronds because community support Walronds building. Town Council. Also Trustees are very well networked. Merchant's House adjacent owned by different types of people - no interest in its future at all. Support also from all levels of council. EH, HLF, Getty.*
- *All the local authorities, conservation officers know we are there to at least come and look at a property, give them a helping hand. Friends and local community around our project.*
- *Community generally are appreciative of the good work that has been done. Frustration at the failure to deliver on the delivery strategy for the canal basin put forward which has stalled. Broadly speaking people still happy with achievements and supportive of what Trust continues to do.*
- *Tremendous goodwill from public.*
- *Villagers. Hartpury 50% commuter village, 50% long term residents*
- *City Council, community*
- *Local community*
- *Community - organisation anchored in community.*
- *Good will from majority of stakeholders - statutory bodies, partners in other national organisation. Membership organisation - 2000 members.*
- *Goodwill from a variety of funding bodies, in particular English Heritage which funded the protective roof in 2005 and has awarded a grant towards the repair of two ranges of roofs in 2009. Also growing goodwill from Heritage Lottery Fund, and a number of grant-giving Trusts. Improved relationship with the Parish Council. Relationship with the East Devon District Council is good, but no funding available; similarly Devon County Council. We believe this will improve once positive progress can be demonstrated. Positive support from our local MP the Rt Hon Hugo Swire MP. Support from the strong body of "Friends of Poltimore House", which is worldwide. An increasing number of volunteers and growing participant/audience for events, including concerts, theatre and focused "fairs", such as crafts, foods, gardening and plants etc. Growing audience for specialist heritage visits, e.g. Devon Buildings Group, the Art Fund.*
- *There is considerable goodwill towards our Trust coming from the County Council and District Councils in particular. Open days for our projects draw our work to the attention of the public of all ages (school children love being "involved") and this provides good press coverage - all of which generates considerable goodwill.*
- *From local residents. Shown by the membership we've got. Town Council formally given support. Support from Levels & Moors and from Somerset County Council*
- *Goodwill from other community organisations, though not general public necessarily. Goodwill from town council, district council. Very good relationships with Architectural Heritage Fund and all our funders.*
- *Coming from all levels. School were enthusiastic about what we did with them. Politicians enthusiastic, community's been enthusiastic. Good feedback on gardens. All projects have been well received by the community.*
- *Local community goodwill, town council, district and county councils - however now a unitary authority. Heritage Open Days well supported.*
- *Generally goodwill, for those who are aware - never been able to identify any ill will. Currently trying to build up relationships with Wiltshire Council*

Some hinted there had been changes, or there was potential for increasing goodwill:

- *Gloucester Historic Building not very widely known - Civic Trust have a higher profile.*
- *Had goodwill within local authority up until several years ago, however lost contacts when people moved on.*
- *Coming from anybody who knows about the Trust, but we're not very well known.*

The stakeholders map for BPTs thus consists of extensive networks – an element that is too easily overlooked when assessing the value of BPTs. Obviously such networks could be massively strengthened; this is addressed in Activity 1 (see Part 3 of this report).

The following aspects of networks are addressed in this section:

- (i) Supporters
- (ii) Community
- (iii) Local planning authorities
- (iv) Local Enterprise Partnerships
- (v) Development Trusts
- (vi) Civic Societies
- (vii) Private developers
- (viii) Other Trusts
- (ix) Other partners

Relationships with funders are explored in a subsequent section.

## Supporters

Many BPTs enjoy wider support and involvement, either through informal membership or a more formal Friends organisation.

	Total in Category	Total number of supporters
<b>0</b>	8	0
<b>Less than 20</b>	5	25
<b>20-49</b>	6	143
<b>50-99</b>	5	378
<b>100-199</b>	9	1,086
<b>200-299</b>	4	860
<b>300-499</b>	3	1,100
<b>500-999</b>	4	2,444
<b>1000+</b>	2	3,402
<b>No Info</b>	11	-
<b>Total</b>	<b>57</b>	<b>9,438</b>

Table 6: Number of South West BPT supporters

Of these, 21 of the 57 Trusts had a 'formal' Friends group, ranging from 10-12 up to 2000 in total.

A number of Trusts were actively pursuing amalgamation to avoid duplication of effort:

- *'Sherborne House is in a 'transitional phase - three organisations involved with Sherborne House - Trust, supporters, activity delivery - going to amalgamate and rebuild a governance body - going to completely change the whole thing.'*

- *‘Totnes & District Society might become a membership group of the Trust - would then be friends - couple of hundred’*

This is the first time that data has been formally collected for a whole area, and while information is still incomplete, nevertheless the total of 9,438 for ‘friends and volunteers’ for the South West area alone suggests that it would not be unreasonable to suggest that the BPT movement may currently consist of some 100,000 supporters across the 9 areas of the UK.

In terms of trends, just as more Trusts are recruiting Trustees than shedding them, so more Trusts are experiencing increases rather than decreases, both in relation to Friends and Membership groups. Some of the survey comments help to explain the figures:

- *Trenance had 850 friends, but price up from £1 to £3 and membership went down. Haven't put energy into putting members up. Had to demonstrate backing of community at the outset.*
- *never been any promotion*

	Decreasing	Increasing	Static	No Info.	Total
<b>Members</b>	3	7	18	29	57
<b>Friends</b>	1	10	8	38	57

Table 7: Trends in BPT Trustees and supporters

(The next step would be to calculate the time volunteers give to each Trust, and convert this into a money equivalent, to demonstrate the contribution and value of the BPT movement. On the South West model, even if the 9,438 people donate only one day per year to their Trust, at the current HLF rate for skilled volunteer time of £350 per day this equates to a total of £3.3 million per year, translating into some £30 million a year across the UK.)

Inevitably, however, it can be particularly time-consuming to organise events and keep momentum up amongst a large number of supporters:

- *Receptions for new members, programme of lectures, run trips, garden party*
- *Take part in heritage open days, also arrange open days for general public and special access for organised schools visits during restoration programme*

More work could be done on evaluating the return on running Friends and Membership Groups. Friends and members, however, can be vital sources of income (see below), of personnel to undertake projects, of Trustees. They can act as a ‘word of mouth’ resource to raise the profile of Trusts, they can act as ‘ears and eyes’ for potential projects, and they can help to ‘ground’ projects in the local community.

Poltimore House Trust runs a corporate volunteering scheme- which helps with fundraising.

There is, however, a difficult balance to be struck:

- *We have an associated charity which has been run down by having BPT activity as priority.*
- *Decided to focus on core business, rather than running programmes for members*

Trusts with Friends and membership groups have grown out of the civic society movement on the one hand or community activism agendas on the other.

## Community

A strong majority of the Trusts considered that the local community was enthusiastic about saving buildings at risk.

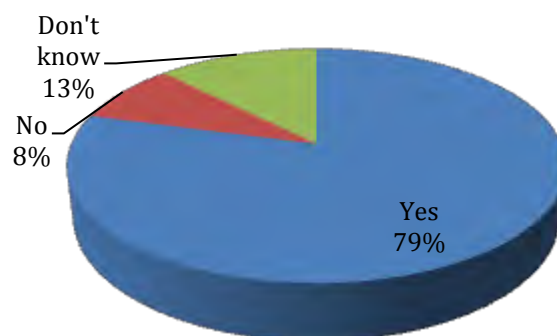


Figure 8: Perceived local community enthusiastic about saving heritage buildings

However, when the question was asked whether the Trust felt its work was understood in the community only just over half (13) felt their work was 'reasonably well understood', while 9 considered there was a 'low level of understanding', one felt it was 'not understood at all' and one didn't know.

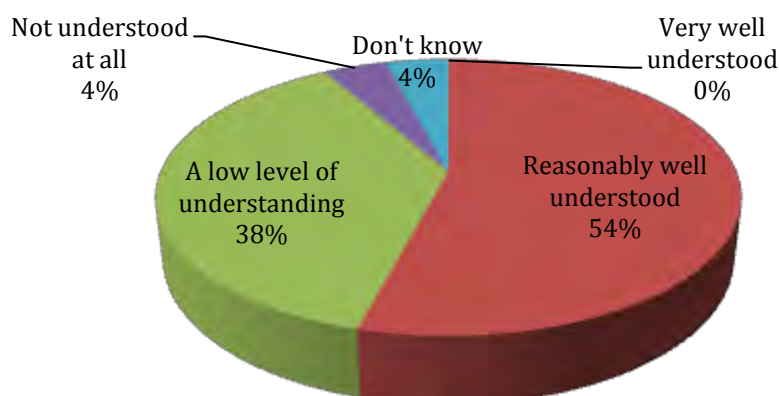


Figure 9: Perceived local community awareness of work by BPTs

- *local community where we're working people do know a certain amount about what we're doing, as with district council. In a large part of the area no one knows what we're doing*
- *Work closely with the Town Council e.g. repair grants scheme, traffic in the town - work with council and development Trust. A lot of councillors are also members of the Trust. County Council - only been a unitary for just over a year. Known by Bradford on Avon Area Board. Close contact with Chamber of Commerce.*
- *Well understood within the councils, not well understood within community yet*
- *Reasonably well understood within the City Council, however not within the local community or local business*

- *Understood within local authority, however people with whom there were good contacts several years ago have left.*
- *Varies. On Duchy project in Lostwithiel - Trust have done presentations to town council, they understand it. Cornwall Council understands - on the specific project - local community - done enough to explain what we're doing. Across Cornwall as a whole probably no one else knows who we are.*
- *Local authorities understand it extremely well. Local people understand, but can't believe how long it takes.*
- *Not known at all by local businesses, local community - not very well, town council - only work with them on specific project. Would understand it but not very well. Making improvements in understanding with districts/county.*

- *Confusion between city council and Trust. People may not differentiate. However tenants and occupiers know their landlord is the Trust.*
- *During Open Days public are interested in the process, what we are and how we manage it, but generally a low level of understanding of the work of the Trust.*
- *Archaeologist at Gloucester City Council has done a lot of community engagement work - various community historic building recording projects. Lot of interest from diverse groups. Community archaeology work by Gloucester City Council has been widely recognised as being cutting edge. Trust is composed of members of City Council and also Civic Trust. Well known in City Council but not very well known otherwise.*
- *District council and county council - thoroughly understood. Still some villagers who don't quite understand. Main local business is Hartpury College - understand Trust and support.*
- *Known very well in city council. Could always do more to promote.*
- *Fairly well understood in local community. Local business - fairly well understood. Town Council not bad.*
- *Could do better in communicating what we do to community. Better understood at local authority level*
- *Local community - want to communicate our vision more. More work to be done with businesses. Local authority - very poor relations.*
- *Understanding increasing rapidly - still further work to be done.*
- *Community enthusiasm about saving buildings at risk - lethargic in general but stimulated when events are held.*

- *Town council is running a focus group looking at heritage of Somerton, amongst other things. Developing a town plan, Trust is involved in that.*
- *Well understood within Town Council. Local community not that well understood, but understood within community groups. County council don't have a focus on us. Not really interacted with local business.*
- *Not everyone will know everything about us, but people who have a say in things are knowledgeable about what we do.*
- *Different communities in Walcot Street. A lot of new residential households in last 15 years - incomers don't understand character of Walcot Street. Historic community of Walcot Street, local pub has been a 'hub' of everything that has been Walcot Street - fringe festival offices behind - this community is very concerned about Walcot Street - but they no longer live here.*
- *Old Town Hall project has generated a lot of interest in town. More publicity is required every time the Trust takes on another project.*
- *Enthusiasm about saving buildings at risk: In recent years there has been a high level of investment in historic buildings in Wiltshire mostly by the private sector. Specific problem buildings, such as the former Assize Courts in Devizes generate a significant level of interest and potential support. A low level of understanding probably because the work of the Trust is not that well known. Enthusiasm for saving buildings at risk only tends to build up when we go into a particular area. Get publicity on a project basis but it doesn't last. People don't automatically think 'Need to go and talk to the Trust' - interest from the private sector and many other competing organisations around*

The above comments demonstrate much could be done in the way of promoting the work of Trusts (See Activity 1 and Activity 3 in Part 3 of this report)

## Local planning authorities (LPA)



Figure 10: Attitude of local authority perceived by BPTs

Of the 24 Trusts involved in face-to-face interviews, exactly one third considered their local authorities to be very supportive and actively encourage, 9 thought LPAs were reasonably supportive, 5 considered them not to be particularly supportive, 1 didn't know and one did not answer.

In the face-to-face interviews, Trusts were asked 'with what types of organisation do you currently work (more than one answer might apply)

Local authority: 15

In terms of their LPAs general attitude to the transfer of community assets, 13 were positive, 2 thought they were negative and 9 didn't know.

From the opposite perspective, 70% of LPAs were aware of BPTs operating in their area, and 90% recognised that the primary role of BPTs was to save historic buildings at risk.

At least 39.4 % had carried out projects in partnership with BPTs (only one considered the project had been unsuccessful) and encouragingly 42.4% would consider working with a third sector group as a delivery vehicle for projects in the future.

Half also considered the role of Trusts to be to provide advice about how to save and maintain buildings, while interestingly 1/3<sup>rd</sup> saw BPTs as a source of grant funding.

- *South Gloucestershire very positive. Others - don't know.*
- *Keep in contact with 11 local authorities and Devon County Council. Keeping in contact with conservation officers, UKAPT, EH, AHF*
- *Hasn't arisen as an issue with the local authorities yet, though looking at ways of involving local groups*
- *Quite positive and improving. Trust is talking to chief exec of district council about properties offering to take on problem buildings. Also talking to county council about old library building. District council has recently published a list of assets and also being more proactive approaching Trusts.*
- *Issue of asset transfer only just beginning to come to the fore in Bristol City Council. No specific strategies.*
- *Big issue for Cornwall Council - lot of heritage assets owned by the council that it needs to do something with. No models yet, need to work out how to make the process happen.*
- *No such transfers have taken place, or are likely in Cullompton*
- *1995 was the last time we had community assets transferred to the Trust. Since March 2010 now have three potential transfers. One has gone through, two potential ones. Trust will facilitate the transfers. 11 different local authorities in Devon.*



Equally 1/3<sup>rd</sup> of LPAs provided project-specific funding, three provided core funding to BPTs and 27.3% had elected Members as Trustees.

Interestingly, LPAs also thought that BPTs could provide useful additional services such as carrying out Building at Risk Surveys (72.7%), feasibility studies and spot listing proposals (both 57.6%) and Conservation Area Appraisals (33.3%).

There was also some limited support for BPTs to carry out neighbourhood planning exercises (18.2%), processing and commenting on planning applications (15.2%), and s.106<sup>4</sup> related work (9.1%), although in each of these cases more LPAs did not consider BPTs as potential partners in these fields.

The relationship between a BPT and its local authority is critical. There is clearly considerable scope for closer working relationships to develop, as some BPTs have not viewed LPAs as natural allies in the past, and some LPAs need to be convinced of the capability of some Trusts to undertake projects. But the area of key concern is the reduction in conservation staffing within local authorities, and therefore Trusts need to ensure they are cultivating relations with Heritage Champions and other Council members, as well as with asset management, housing, regeneration and planning departments.

Heritage Partnership Agreements between local authorities and Trusts might be worth exploring as a way forward, so that expectations on both sides are clearly understood.

- *Trust was a beneficiary of asset transfer on its establishment and performs a vital service delivery function in preserving, conserving and bringing forward good uses of the canal and quay area. City Council has a programme of community transfer to community associations which is broadly completed. Procured accommodation for most of the community associations who wish to have properties. None in canal & quay area, no specific demand for premises there. Trust not governed by Quirk report type prerogatives, but would look favourably on a transfer if a proposal of that nature came about.*
- *Devon County council have transferred several heritage assets over Devon. Not aware of Exeter City Council transferring*
- *City Council transferred Llanthony Priory (Gloucester) to a Trust - to promote the use of the priory for educational, cultural & recreational purposes. Gloucestershire Council may acquire buildings from South West RDA - key sites, buildings may be transferred. In the future Council may consider elements of those buildings for community use.*
- *Transferring assets hasn't been relevant in the village context*
- *County Council currently looking for Trusts and community bodies to take over libraries. However mainly not historic assets. Llanthony was transferred from city council. Attitude of city council and 7 district councils - generally positive but they need a lot of surety and confidence in Trustees.*
- *Focused currently on Carriage Works (II\* at risk) and Westmorland House. However council wouldn't transfer the building to Love Bristol - the building is currently a ruin. It would need CPO.*
- *Three tiers of local government - good working relationship with all. LRDT paid to manage community consultation and planning process in town and surrounding areas. District council are one of the pilot areas looking at 'neighbourhood planning' Lyme Regis - not very many local authority owned assets. However have been talking to county council about transfer of library, however came to nothing.*
- *Relationship with local authority (local elected members, planning department) poor, little joint working. No corporate asset transfer policy in Swindon. Single biggest problem - holds the Trust back.*
- *This has not as yet become an issue.*

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<sup>4</sup> s.106 relates to monies paid by developers to local planning authorities in order to offset the costs of the external effects of development. Section 106 of the Town and Country Planning Act 1990, in conjunction with DoE Circular 5/05, allows for local planning authorities and persons interested in land to agree contributions, arrangements and restrictions as Planning Agreements or Planning Obligations.

The potential for asset transfers is also likely to grow under the current Localism Agenda, although again the expertise required to deal with specific heritage assets is threatened by public sector cuts.

- *Not yet tested. Old Town Hall Somerton is privately owned - Trust would like to acquire it for community ownership. Town council would probably be supportive. However not sure about attitude on transfer of assets generally.*
- *Stroud and valleys - aren't currently any community assets up for sale.*
- *Transfer of assets is not something that's happened back to the community, it's happened that the community gave its assets to the district council (when Totnes Borough Council was disbanded in 70s) Town Council is trying to have more control over that, but Trust is not directly involved in negotiations.*
- *Have pursued a bit. Trust wanted to acquire a building (Corn Market), however the council did not acknowledge the Trust as organisation with democratic standing - can't demonstrate strong community basis.*
- *Wiltshire Council just established, so need to remake relationships. In current economic climate local authorities unwilling to help Trusts financially.*
- *There is current policy but it needs to be tested. Not currently involved in any asset transfer projects directly. Looking at some historic building problems with Wiltshire Council in an advisory role - to see what would be an appropriate way for the council to react in relation to its historic buildings. Starting to establish a relationship whereby if the council wishes to dispose of one of its historic buildings that it would discuss with the Trust what the options are. Wiltshire Council Property Services is conscious of its responsibility with regard to disposal of heritage assets in accordance with EH guidelines.*
- *Better relationship with our local authority - caused problems with raising funds. Funders want to know what your relationship is with L.A. - getting in the way of moving forward on localism changes. Have been offered mediation funds - L.A hasn't been willing to enter into that process. Is focussing on relationship with MP and national level.*

### **Local Enterprise Partnerships (LEPs)**

LEPs are emerging and could be important potential partners. At the time of survey (March 2011) only 8 Trusts were aware of LEPs being established for their area. An equal number reported none had been set up, and the remaining third didn't know.

The 8 Trusts who were aware of their LEPs either didn't know or felt their work was not understood by LEPs.

As at March 2012 there were six Local Enterprise Partnerships covering the South West.

## Development Trusts

In the face-to-face interviews, Trusts were asked 'with what types of organisation do you currently work (more than one answer might apply)

Regeneration company or Development Trust: 2

- *Lyme Regis Development Trusts works with local organisations on project by project basis. Often called in to help deliver a project for another organisation e.g. worked with Town Mill Trust in developing a derelict building.*
- *The Trust is both a BPT and development Trust.*

Closer working between BPTs and Development Trusts is clearly essential, where BPTs are able to provide the expertise to tackle heritage assets, but would at the same time benefit from learning from the social enterprise culture. (See Alanna Ivin: "Saving Local Heritage in the 'Big Society' Can the third sector pick up the pieces?" (February 2011)<sup>5</sup> This study used case studies from the South West and concluded that "building preservation trusts could play a pivotal role in working with councils, developers and other third sector groups to provide better conservation outcomes."

## Civic Societies

In the face-to-face interviews, Trusts were asked 'with what types of organisation do you currently work (more than one answer might apply)

Civic society: 6

- *Civic Trust*
- *Were lead partner in building a bridge across river*

As the BPT movement itself grew out of the Civic Trust movement, and a number of Trusts in the South West carry out activities that tend to fall under the Civic Society umbrella, there is scope for UKAPT to re-engage with Civic Voice at a national level and for BPTs to re-engage at a regional and local level with civic societies to explore synergies in working more closely together. (The NHPP refers to a study to be undertaken by Civic Voice to map community activity across England).

## Private developers

In the face-to-face interviews, Trusts were asked 'with what types of organisation do you currently work (more than one answer might apply)

Private Developer: 2

- *Trevor Osborne Group*
- *History of refurbishment projects with reputable developers Sutton Harbour PLC - exclusivity agreement - scheme of refurbishment and regeneration in the canal basin, currently stalled. Discussions with Devon County Council about building a new outdoor education centre on Trust land – c. £5.5 million project.*

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<sup>5</sup> Master of Science in Conservation of the Historic Environment dissertation submitted to the School of Construction Management and Engineering, University of Reading.

Trusts have not generally been pro-active in cultivating close relationships with developers – again LPAs could play a seminal role in forging closer working; it is important that the historic environment is recognized in Community Infrastructure Levy schedules and that continuing s.106 agreements where appropriate pay attention to the principles defined in English Heritage’s “Enabling Development and the Conservation of Significant Places” (sections 4.4.3-4; 4.7.6; 5.13.2).

## Other Trusts

There is evidence of some close co-operative working between Trusts. There is also clearly scope for additional partnerships.

- *Poltimore House working with Exeter Historic Buildings Trust*
- *Hartpury working to set up new Trust*
- *Kingswood working with Avon Industrial Buildings Trust*
- *Somerset HBT delivered the Dunster Tithe Barn project*
- *Somerset HBT working with Vivat Trust*
- *Walronds PT working with Vivat Trust*

## Other partners

There are many other organisations and stakeholders involved in the delivery of Trust objectives, representing a very broad range of interests. Multiple partners are involved in a number of projects.

Partners mentioned include:

- *Ancient Monuments Society*
- *Arts Council – not formalised yet*
- *Avon Gardens Trust*
- *Bradford-on-Avon Town Council*
- *Brownsword Charitable Foundation*
- *Business Link*
- *Carpenters Fellowship*
- *Church of England project*
- *Church Wildlife Trust*
- *Clocktower Association*
- *Community interest company*
- *Community Matters*
- *Country Houses Foundation*
- *Cornish Buildings Group*
- *Cornwall Heritage Trust*
- *Council for Voluntary Services CVS*
- *EDF electrical supply company*
- *English Heritage (head offices in Swindon)*
- *Friends of St Michaels Trading Estate - active in saving historic building on trading estate.*
- *District Council / Town Council.*

- *Fudge Trust*
- *Gloucestershire College (has been built over part of the scheduled site)*
- *Jurassic Coast World Heritage team.*
- *Kingswood Heritage Museum Trust*
- *Levels and Moors Local Action Group*
- *National Trust (Head Offices in Swindon)*
- *Natural England*
- *Natural History Museum*
- *NCVO*
- *Newquay Old Cornwall Society – heritage exhibitions*
- *Newquay for Excellence Training - advising on the use of staff and the sort of courses required*
- *Photographic group.*
- *Plough Arts Centre – potential partner*
- *Prince’s Regeneration Trust (x2)*
- *RSA*
- *Shilhay Community (potential partner) - Exeter based charity for the homeless, run hostels. But also have a project called the Meaningful Occupation Project (MOP). The MOP team come and work on house - budget for training in construction techniques and certification*

- Somerset Archaeological and Natural History Society (own Taunton Castle and Castle House)
- South Glos Mines Research Group
- South Somerset Volunteer Community Association (SSVCA) - providing mentor
- Business Consultancy prepared a questionnaire for every household in Somerton
- Stroud Water Textile Trust.
- Stroud History society
- Stroud Valleys Project - environmental organisation
- Stroud BPT participated in community planning conference Theatres Trust
- Town and parish councils
- Trust school, Lower Lodge.
- UNESCO

- University Business School - research and knowledge transfer group, Archaeology, History on different projects Have hot desk at Innovation Centre - good networking.
- Universities
- Victorian Society
- Was involved with parochial church council on potential project
- Well networked with amenity societies Frome Historic Buildings Trust and individuals
- West Coker Parish Council
- Wiveliscombe Parish Council
- Wiveliscombe Area Partnership
- Wiveliscombe Civic Society
- Work with Town Council for historic buildings grants scheme. Provide grants to projects.

In terms of the proposed pilot initiatives, the absence of Housing Associations from the above list is noteworthy. More generally, schools are mentioned by only a few Trusts, although projects being developed by Bristol BPT, Somerset BPT and Poltimore House are breaking new ground in forming closer partnerships with education providers, and The Churches Conservation Trust at Langport could prove seminal in engaging 16-24 year olds in heritage management.

When asked to name Potential Partners, the following were listed:

- Bristol Industrial Archaeological Society
- Bradford on Avon Museum, Bradford on Avon Development Trust, Chamber of Commerce, Wiltshire Gardens Trust
- Lyme Regis Development Trust
- Liaise with Bristol Visual and Environmental Trust, various potential partners -business firms, charities, Merchant Venturers
- development Trusts look more closely at asset transfer and community shares non heritage organisations e.g. housing associations
- Local authority. Provide space for Barnardo's, foster care, hire the premises to National Trust, St John Ambulance, Hospice Care, Hospice Southwest etc
- Need to improve relationships with Environment Agency - difficulties associated with flood risk in and around the quay and canal basin. Need to ensure flood prevention proposals take account of aesthetic requirements of the area.
- Could work more with other BPTs. Could work more closely with City Council over St Nicholas Priory.

- Woodchester Mansion, Gloucestershire College has been doing Prince's Trust skills training with Woodchester. Llanthony Secunda Priory Trust exploring possibilities for cooperation - rural/urban heritage.
- Could work more closely with BPTs
- Would like to work with Google Earth. Often want to trade volunteers with Town Mill Trust.
- UKAPT - could do a lot more there both regionally and nationally. Quite keen to pull together heritage sector in Swindon - more local partnership work needs to be done.
- Potential for more working with business. Good connection with Exeter Express & Echo newspaper. Devon & Cornwall Business Council, Chamber of Commerce, Institute of Directors. Royal Society of Arts. University of Plymouth - MA Conservation course, Exeter College construction students, Bicton College - Earth Centre - sustainable living. Exeter City Council officers' supportive re Shilhay community work.

- *Housing associations. Possibly post project work with Vivat Trust (Walronds and Castle House) Heritage study tours.*
- *Town Council Business Association*
- *Development Trust - working towards closer partnership. If they manage to get hold of 'Creamery' site there is a listed building on it (Brunel pumping station)*

- *Depends on project, but could work with arts community in Bath and wider.*
- *Development Trusts, Rotary, Chamber of Commerce*
- *Possibly private sector. Social housing - have talked to housing associations in the past.*

Some Trusts are clearly well networked but the list also demonstrates there is considerable appetite for extending those networks by reaching out to potential partners in the historic environment sector and beyond.

To conclude Issue 6: A number of Trusts in the South West have mobilised a great deal of support through their volunteer networks. Some work particularly closely with their local authorities who are clearly key partners in taking projects forward. Trusts are perhaps poor at articulating and celebrating the partnerships in which they are already involved. They are also enthusiastic about sharing and assisting projects by forging partnerships with a wide range of stakeholders; however BPTs could be more integrated into the historic environment network, whilst links beyond the sector evidently need to be strengthened; there is clearly considerable scope for better networked relationships with civic societies, development trusts, LEPs, and developers, as well as a range of other providers in the South West

## KEY ISSUE 7 (relating to Trusts): GOVERNANCE

Boards tend not to be over wieldy in the South West with the majority having no more than 10 Trustees.

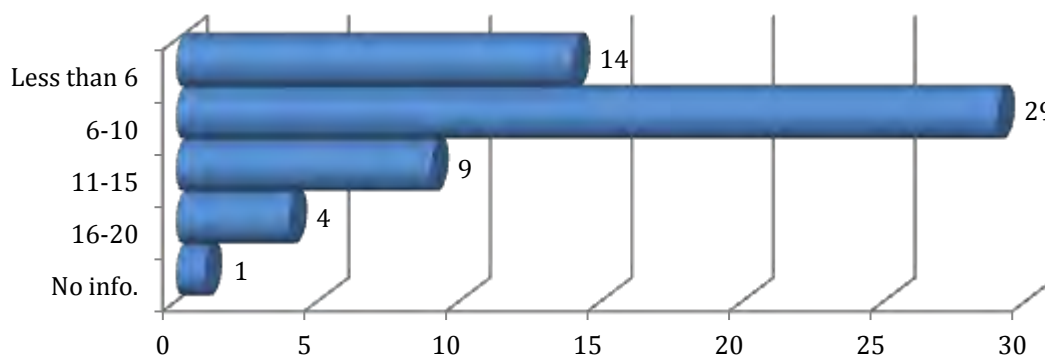


Figure 11: Number of BPT Trustees

One Trust with 14 Trustees mentioned that it had 'altered mem & arts to allow more Trustees, probably too many at present'.

When questioned about the efficacy of their operational model, 11 Trusts out of 24 in the face-to-face interviews stated their Trustees and volunteers to be their chief weakness. (This contrasts to 15 Trusts who saw their Trustees as a key strength.) Even with effective Trustees, the issue of governance was touched upon by many Trusts:

- *getting younger members with time to do things for us is very difficult - more passive support from younger people. The Trust's success and weakness depends upon the quality of Trustees and volunteers we are able to attract.*
- *need more Trustees*
- *replacement of Trustees is difficult - finding people with time available for project in development phase. Getting younger Trustees.*
- *expertise gained by a small number of Trustees, ageing Trustees.*
- *need fresh input, new ideas. All Trustees are either members of Civic Trust or City Council. Depend largely on voluntary help*
- *harder to get voluntary Trustees and project organisers in current economic situation*
- *predominance of having Trustees who are councillors - not their first interest. Average age of Trustees too high.*
- *a lot of experience vested in Trustees, would need to be able to replace*

- *there are weaknesses in the operational model of the current Trust, which has yet to develop clear roles and responsibilities for its Trustees. The Trust needs greater expertise and experience to manage such a complex project efficiently. There is value in non-local Trustees, but inevitably engagement limited.*
- *potential loss of key governors or officers of Trust who would need to be replaced.*
- *a smaller number of active Trustees is better.*
- *need more Trustees*
- *smaller Trustee group would make management more easy*
- *reliant on Trustees. Problem is time - running a project takes an awful lot of time. Need paid staff.*
- *will struggle to replace Trustees when current ones retire/die.*
- *need some younger Trustees, possibly not to have so much dependence upon Trustees drawn from the councils. Currently have a board of up to 18.*
- *more operative Trustees - which we're now getting.*
- *engaging interest and support from a new generation of Trustees*
- *BPTs as a whole - people will have less time available to act as Trustees.*

## Age Profile

Problems are clearly associated with the age profile of Trusts. Of the 24 Trusts questioned in the face-to-face interviews:

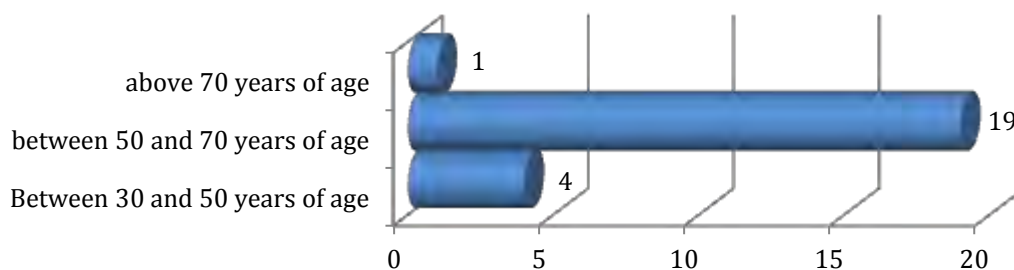


Figure 12: Age profile of Trustees

## Trends

Surprisingly, however, the majority of Trusts do not appear to be shedding Trustees:

	Decreasing	Increasing	Static	No Info.	Total
<b>Trustees</b>	2	9	44	2	<b>57</b>

Table 8: Trend in recruiting BPT Trustees

The picture is therefore not as gloomy as one of the comments would suggest:

- *Trustees rapidly decreasing because people want to wind up Trust*

In fact, more Trusts are recruiting Trustees than shedding them.

## Skills

When questioned about the range of skills that Trustees had answers were varied; the aggregated numbers shown below demonstrate a healthy hierarchy, with a good mix of skills and an emphasis on project management.

- *Business management, fundraising, project management: 19*
- *Architect, Designer: 13*
- *Local authority Councillor, Civil Servant: 12*
- *Finance: 11*
- *Chartered Surveyor, Valuer, Estates management, Estate Agent: 10*
- *Lawyer: 9*
- *Structural, Mechanical, Electrical, Civil or IT Engineer: 7*
- *Town planner, planning officer, urban design: 7*
- *Historian, building historian, building inspector: 7*
- *Conservation Officer: 6*
- *Teacher or lecturer: 5*
- *Public relations, sales and marketing, journalist: 5*
- *Archaeologist: 5*



- *Community regeneration: 4*
- *Environmental Conservationist, Landscape Architect: 3*
- *Property developer: 2*
- *Stonemason, carpenter, or other craft skills: 2*
- *Quantity Surveyor: 1*
- *Audience Development, heritage interpretation, tourism: 1*

There are also many other skills in evidence and these included:

- *IT software development*
- *IT specialist, Builder*
- *English Heritage field monuments warden*
- *Local authority councillor*
- *Ecclesiastical architect, conservation architect*
- *Admin*
- *Railways employee*
- *Catering Wildlife conservation*
- *Building ops manager, HLF ops manager, former Lord Lieutenant*
- *Procurement, buy in skills*
- *Charity management*
- *Systems engineering*
- *Organiser of Bath Fringe Festival - arts Charity management Local history*

One Trust stated that

- *Would like developer and landscape architect*

Crucially, 'Trustees are a key resource for ensuring continuity of skills.' In the face-to-face interviews, only 9 of the 24 Trusts had a recruitment policy aimed at attracting new Trustees. As the cases below demonstrate, the approach of most Trusts tended to reflect stated intentions rather than targeted action plans:

- *we hold receptions for new members, programme of lectures, run trips, garden party - keep in touch with membership so can spot people.*
- *plan to produce a leaflet describing the Trust and what it does. Create website. Trying to increase number of skilled Trustees.*
- *group of 10 Trustees - looking all the time for people we think could carry Trust forward. Trying to find younger Trustees. The most recent additions to the Trustees are from our volunteers.*
- *have regular advertisement that we'd like to have a broad representative cross section of Trustees. Invite to an induction process. If they still want to be a Trustee they can be seconded, then appointed at AGM. Finding Trustees is a challenge.*
- *have recruited in an ad hoc way, but need to move on. Have new role description for a chair includes working with Trustees to develop the organisation, mentoring individual Trustees, strategic planning, thinking of the fundraising and grant raising strategies and making sure all strategies and policies are in place. Raising profile. As yet needs to be implemented.*
- *when we started the Trust we asked people what special skills they had that they could offer. We've got a database of people who are prepared to provide these skills. No problems in replacing Trustees*

- *informal networking - effective*
- *word of mouth, effective with new project in hand.*
- *not formalised, but aware of needing to bring in younger people*

In the face-to-face interviews, 7 Trusts stated they used a skills audit process for Trustees, but the majority (17) did not.

Although only one Trust in the face-to-face interviews stated they had a training policy (see below), 13 of the 24 Trusts stated their Trustees had access to training. One didn't know.

In terms of types of training offered, this consisted of:

- *Trustee Responsibilities: 7*
- *Funding: 2*
- *Building Conservation: 1*
- *Business Planning: 1*
- *Others: 6*

As the comments below reveal, even where training is offered, it is not always taken up, or it is not delivered in a structured way:

- *could go on APT conferences if they wanted to, though not so many have. Cost of going to conferences is a deterrent.*
- *online via Charity Commission website*
- *council members have an extensive range of training courses that they're able to attend. Available, but don't necessarily attend.*
- *have access but don't receive it other than respondent - looks around at courses. When there is a project in mind assess what skills are needed -go and self train.*
- *have access, up to Trustees whether they receive training. DTA provide advice and guidance to Trustees. People might decline to be Trustees if they were required to go off on courses all the time.*
- *ad hoc - needs development*

- *Since the survey was taken, Trustees have had some access to training, and before the survey Trustees had opportunities to engage in 'awayday' activities focused on developing the Trust facilitated by expert (and paid for) facilitators.*
- *No current access to training, but this would be addressed if required. Volunteer training facilities are provided usually at no cost by the local District Councils.*
- *APT conferences*
- *Local voluntary and community action group offer training*
- *Networking at SWAPT meetings*
- *have been on 6 session business plan course, very useful*

To conclude Issue 7: While breadth of skills, size of boards, age profiles etc. have been usefully mapped, the key aim, as one respondent stated, is to ensure Trusts have "well-networked" and "effective" Trustees. The capacity building issue is to recruit new, younger Trustees with a more wide-ranging assembly of skills, so as to help Trusts engage with new partners as well as deliver projects more effectively.

## KEY ISSUE 8 (relating to Trusts): STRATEGY & POLICIES

### Strategy

Only half (12 out of 24) of those who participated in the face-to-face interviews stated they had a current strategy in place aimed at increasing capacity in the Trust. Digging deeper, it is clear from the comments that actual strategy documents which state the mission and vision of the Trust, are rarely produced. Strategic direction is sometimes confused with marketing activity and planning, or a recruitment plan aimed at attracting new Trustees. The following comments were collected in relation to whether Trusts had active strategies or strategic aims.

- *Nothing written, however Chair's personal view - would like to move to a much more sustainable, less grant dependent Trust, professionalise. Acquire and hold buildings, rent and lease.*
- *Cooperation with Bristol Industrial Archaeological Society (BIAS) which has large membership and good magazine.*
- *More publicity, meeting in Mansion House next month with Lord Mayor, presentation of work to the Trust. Developing a friends group and website.*
- *Getting new younger Trustees. Encouraging volunteering and other groups. New History group. Gardening group. Lot of activity with young mothers and toddlers.*
- *Discuss at every council meeting quarterly and look at the market and what we need to do. Quarterly strategy.*
- *Currently writing a business plan (third party advice). Have identified need for a 'friends' group to widen Trust base.*
- *Annual review and proposals for 2011, 2012. Want to professionalise activities improving our volunteer commitments*
- *Asset based strategy which identifies a number of opportunities that we're developing. Currently own four buildings, all of which are in a conservation area, one of which is grade II listed building in which affordable housing is provided*
- *About to go into strategy development to work out priorities for next couple of years. Working with HLF about how Trust could take on quite a small fund as a stepping stone to be able to take on a major grant in the future for capital works. Start with engagement, build capacity of organisation then move forward. This is a membership organisation - important to communicate vision outwards. Need to take advantage of opportunities offered with localism and asset transfer.*
- *On business plan one of the aims is to increase strength of Trust. Have brought new Trustees on, but still some work to do.*
- *It is aimed to increase the number and specialisms of the Board of Directors and to seek younger Directors. (We would like to draw more women on to the Board.)*
- *Through publicity raising the profile of the Trust in the town.*
- *Have steps in place, but not as defined as a strategy*
- *Recruited new Trustees as needed with appropriate skills*
- *Have produced a strategy paper - plan 2009-12 looks at project opportunities and problems. Trust will look at any project as long it has heritage value, doesn't involve a huge conservation deficit, that a proper end use can be secured and that the Trust is the most appropriate organisation to undertake the work. Would work with anyone in the county who has a joint interest, in particular the local authority, other BPTs or other community groups. We would want to use the knowledge and experience and reputation of the Trust to take that forward. Strategy paper has been produced for the Trust to make sure it remains relevant. Debate is ongoing.*

### Policies

As a further sign of lack of robustness, in the face-to-face interviews, it emerged that a third of Trusts have no written policies in place. Only one Trust reported that we 'have all our statutory policies in place.' One Trust mentioned that 'many other functions are done by

associated charity' and another Trust stated policies were 'dealt with by Gloucestershire College'. One Trust was 'drafting policies, plan to organise training for Trustees'.

Policies which had been written were as follows:

- *Trustee Recruitment: 9*
- *Equal opportunities: 9*
- *Health and safety: 6*
- *Volunteers including volunteer placements: 3*
- *Employment: 1*
- *Training: 1*
- *Education: 1*
- *Dealt with by our local council: 1*

Other:

- *conservation policy. As required by HLF activity plan*
- *Trust doesn't have its own staff*
- *have 'reserves policy'*
- *would put more policies into place if Trust was more active*
- *other written policies, but did not specify*
- *other policies still in pipeline - will be updated according to funder requirements in future*

None reported having had a building conservation policy in place

To conclude Issue 8: A majority of Trusts lack strategies and policies, and while they should not be distracted from the principal aim of delivering projects effectively, most funders require Trusts to have these in place as a demonstration of robustness and viability.

## KEY ISSUE 9 (relating to Trusts): CORE FUNDING

Funders and grant-giving bodies unfortunately tend to shy away from addressing a key need – to support capacity building in Trusts. The focus on project delivery and outcomes has tended to weaken Trusts (e.g. by encouraging only single building project Trusts) rather than assisting the need to address structure, governance, strategy and policy issues outlined above.

When asked ‘does your Trust receive or need to generate core funding for day-to-day operations?’ all but one Trust in the face-to-face interviews said ‘Yes’. One Trust noted that it had ‘operated for 15 years with very little grant funded money’.

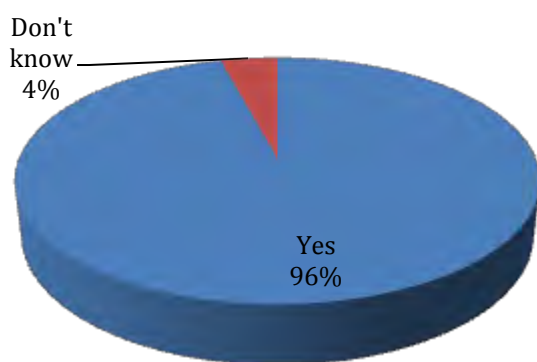


Figure 13: Need for BPTs to obtain core funding

The source of such funding:

- *Investment income: 9*
- *Membership subscriptions: 8*
- *Trading income: 8*
- *Local authority grant: 4*
- *Staff seconded: 3*
- *Gifts and donations: 3*
- *Pro bono work and volunteering: 1*
- *Sponsorship and local fundraising: 1*
- *HLF grant: 1*
- *Esmee Fairbairn Grant: 1*
- *Grants: other sources: 1*

Few saw property disposal as a means of meeting core costs

None received core funding by:

Other types of core funding include:

- *Have a general fund left over from previous projects - use it for day to day expenses. Volunteers mainly don't claim expenses. Can also seed other projects with this fund.*
- *Our principal source of income is property rental*
- *Grant for set up costs - town council, not continuing*
- *Publications*
- *Sales. Property rent.*
- *Devon County Council - discretionary*
- *Tenants pay rent, which substantially funds the day to day operations of the Trust. Have resources to carry out projects.*
- *c.£12,000 a year rental income from adjacent hotel, renting rooms, also for weddings and functions*
- *Struggle with having sufficient core funding. Annual festivals in orchards - general fundraising. Various village events, however Hartpur Heritage Trust buildings are 2 miles outside village. Running costs of hall are covered by lettings.*
- *Buildings were transferred from City Council, Gloucestershire College (built on part of the scheduled site) paid for some of the work upfront and the Trust reimbursed later. English Heritage funding to write business plan. Next project is to repair a building which can be leased out and provide core funding.*
- *The HLF Grant is refurbishing a facility that will allow us to raise revenues in addition to enabling the HLF project to take place. Other facility rentals (grounds etc. for parties, weddings, theatre, concerts) also support core funding.*
- *SBPT is dependent upon core funding from the District and County Councils.*
- *Only a very small amount of rent. Selling leases at present to create funds.*
- *Take a percentage of projects that we're running to cover core costs. Esmee Fairbairn Foundation funding to develop capacity.*
- *Currently get £5,000 grant from county council, but this may not continue.*
- *Sherborne House Friends have established an endowment fund.*

- *issuing shares or bonds*
- *using commercial loans as a means of paying core costs*

None received core funding from:

- *landfill operators*
- *English Heritage or other funders*

One Trust noted that ‘from this year there will be no more revenue grants’.

SBPT noted that: ‘two district councils have withdrawn their funding due to financial cut backs. One district has reduced its contribution by approximately three quarters. Therefore out of a potential total of c. £10,000 p.a. approx. we are reduced to approximately £6,340 p.a. Therefore we are becoming increasingly dependent upon project funding to run the "office" side of our work during a project. As can be seen the future of the SBPT is not too stable at the moment.’

## **Staff**

Many Trusts in the South West are run on a voluntary basis. The pattern appears at first sight somewhat different here to that in Scotland, where there would appear to be a greater number of ‘professional Trusts’. The relative lack of core funding also appears to be a reflection of this situation. Nevertheless, when examined in greater detail, it is clear that Trusts in the South West do support a number of posts, or buy in expertise as required.

The difference is that staff in the South West do not tend to ‘front’ their Trusts in the same way that some Scottish Trusts employ a ‘Director’

- *City Council officer expertise is always available for very affordable price.*
- *Gloucester Historic Buildings contributes to salary of officer at council. Council facilitates creation of blue plaques etc*
- *Part time administrative staff seconded*
- *Ramsbury Memorial Hall has a paid caretaker*
- *SHBT pays its Secretary for xx days a week*
- *Trust employs conservation officer at council on part time basis.*
- *Wiltshire Council provides limited officer time to act on secretarial side. Small payments made to Secretary and Treasurer. Architect reimbursed for time spent on Trust business. (All payments are at a low “charity” rate.)*

Other Trusts have access to paid advice and assistance either for project or facility management on an ongoing basis:

- *Arnos Vale Cemetery Trust*
- *Bath Preservation Trust*
- *Bradford on Avon Preservation Trust*
- *Bristol Buildings Preservation Trust*
- *Coldharbour Mill Trust*
- *Cornwall Buildings Preservation Trust*
- *Devon Building Preservation Trust*
- *Exeter Canal & Quay Trust*
- *Ford Park Cemetery Trust*

- *Gloucester Historic Buildings Ltd*
- *Hope Community Church*
- *Llanthony Secunda Priory*
- *Love Bristol*
- *Lyme Regis Development Trust*
- *Plymouth Barbican Association Ltd*
- *Poltimore House Trust*
- *Rame Conservation Trust*
- *Ramsbury Memorial Hall*
- *Somerset Building Preservation Trust*
- *Spike Island Artspace Ltd*
- *Vine Project*
- *Wiltshire Historic Buildings Trust*
- *Woodchester Mansion Trust*
- *Yarner Trust*

It would, therefore, be misleading to consider these Trusts are 'inactive'.

No data was collected on gender either for Trustees or employees. However one Trust noted that:

- *'Not changed to any great extent in its modus operandi but the appointment of a woman as its Secretary with fundraising, organisational, adult education background has brought a new dimension to the Trust's work. Having a woman in the secretary job with fundraising/organisational/outreach experience brought a different orientation/attitude to the Trust.'*

To conclude Issue 9: An over-emphasis on project delivery means that core funding and staffing are not adequately addressed. There is a basic concern that single building trusts cannot generate viable, sustainable solutions and, once the project is completed, skills and expertise tend to be dissipated. Some of the multi-project trusts can meet some core costs through investment income/portfolio management and there is a possibility that HLF may be able to assist with capacity building of organisations in the future. Any initiatives to stimulate BPT activity in the South West should link project funding with the creation of permanent or long-term staffing to create better continuity between projects.

## KEY ISSUE 10 (relating to Trusts): RAISING PROFILE BY ACTIVITY PROMOTION

From the face-to-face interviews, Trusts used a variety of methods to promote the work of their Trusts (more than one category could be selected), although 6 stated that they didn't actively promote their Trusts. One of these commented that

- *the Trust is based in city council's estates department -service provided is property related. Possible weakness. Don't actively promote.*

Another that the 'Civic Trust are more high profile'

The popularity of various methods was as follows:

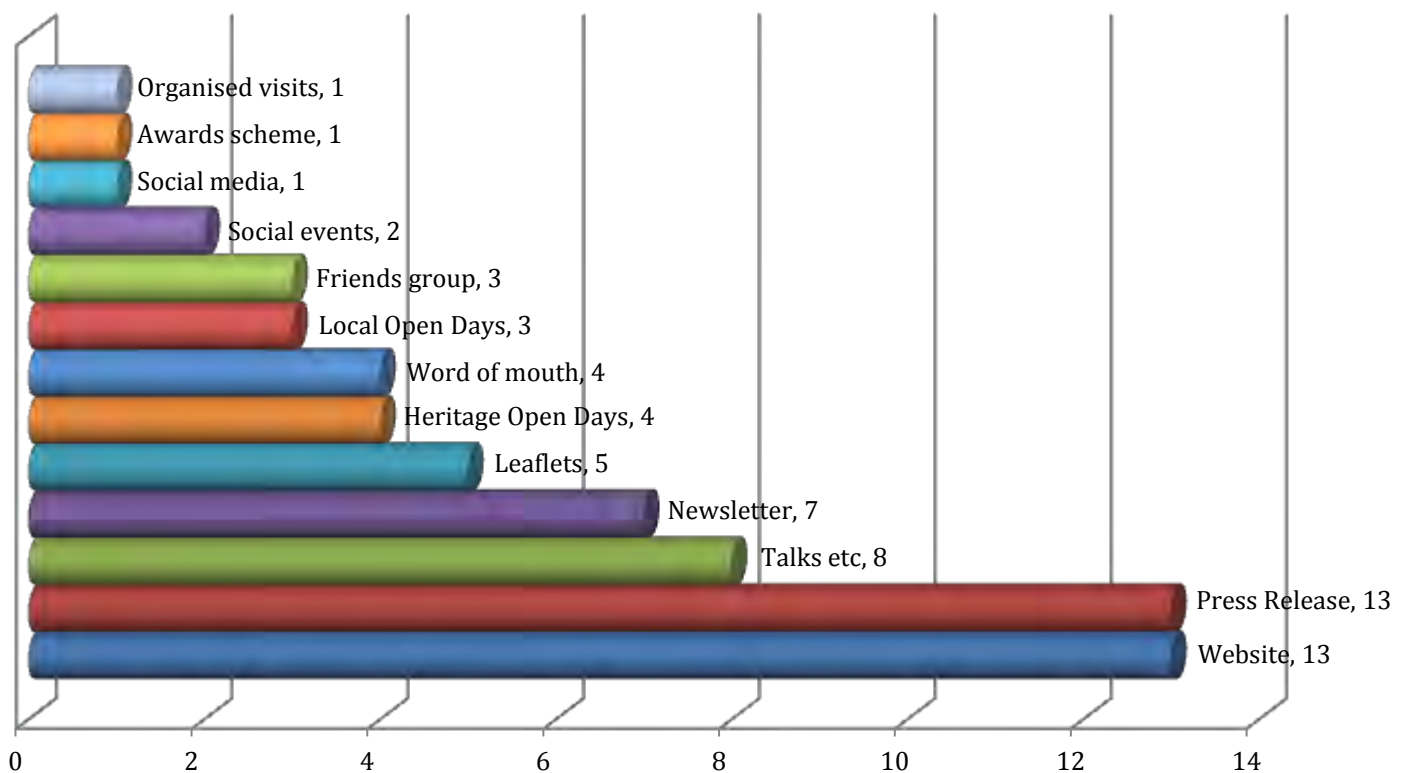


Figure 14: BPT promotional methods



#### Other methods include:

- *gave a presentation of Brandy Bottom project at the South Glos Mines group event. Have prepared written history of mines - will publish.*
  - *posters around the town, stalls at street fairs, give grants. We don't have a friends group - instead we have a large membership of over 500*
  - *intend to produce leaflet to promote existence of Trust and encourage people to apply as Trustees, possibly website.*
  - *organising public meeting in March to publicise work of Trust - inviting charities, groups like Merchant Venturers, British Society of Architects*
  - *publications, exhibitions, current exhibition in central library, recent publication on Acton Court which we rescued*
  - *doesn't seem any point promoting Trust currently as we can't respond, don't have capacity as yet*
- *poster outside building - central town location, giving talks to other organisations U3A visits and tours, Probus reports to parish, district and county council*
  - *contact with local authorities*
  - *active with English Heritage. Urban regeneration company are going to be picking 12 sites - 12 postcard sites to see in the city - want to be one of these.*
  - *run learning centre - disseminate information there.*
  - *repositioning, rebranding - don't always get full story through report in a paper*
  - *Facebook, LinkedIn, Twitter*
  - *community discussions*
  - *news included in Civic Trust newsletter, once a quarter*
  - *Articles in magazines - Wiltshire Lifetime - fairly low key, project by project basis.*

No Trust appears to use paid advertising.

To conclude Issue 10: Trusts struggle to ensure their projects are well publicised. There is clearly a great deal of scope for BPTs, either singly or in combination, to promote themselves and their work to a wider audience. Activities 2 and 3 in Part 3 of this report provide some recommendations to address this.

## ISSUES RELATING TO PROJECT DELIVERY

### KEY ISSUE 11 (relating to project delivery): DEFINING & MAXIMISING SUCCESS FACTORS FOR PROJECTS

The following Trusts have projects in the pipeline<sup>6</sup>:

Authority	Local authority	Local BAR Register	Active BPTs	Projects in pipeline	BaR on EH Heritage at Risk Register 2011 being tackled by BPTs	Other historic buildings being tackled by BPTs
UA	Bath and North East Somerset Council	Yes	Bath Preservation Trust	Whole Story, 1 Royal Crescent (Grade 1)	-	1
UA	Bristol City Council	Yes	Cleveland Pools Trust	Cleveland Pools BaR Grade II* (EHR)	1	-
			Walcot Street Trust		-	-
			Arnos Vale Cemetery Trust	Arnos Vale Cemetery buildings & monuments BaR Grade II* (HER)	1	-
			Bristol Buildings Preservation Trust	Lower Lodge, Ashton Court BaR Grade II* (EHR)	1	-
			Bristol Visual and Environmental Buildings Trust		-	-
			Hope Community Church	Hope Community Church, Hotwells. Bristol (Grade II)	-	1
			LoveBristol	The Carriage Works BaR Grade II* (EHR)	1	-
	Spike Island Artspace		-	-		
	Bristol City Council; Bath and North East Somerset; South Gloucestershire	n/a	Avon Industrial Buildings Trust	Brandy Bottom Colliery BaR SM (EHR)	1	-
UA	Isles of Scilly Council	No	None		-	-
UA	Cornwall County Council	Part	County Trust: Cornwall Buildings Preservation Trust	Duchy Palace BaR Grade I (EHR) (with the Prince's Regeneration Trust); Foundry BaR Grade II* (4 buildings) (EHR)	2	-
			Rame Conservation Trust	Maker Heights Barracks (Grade II*)	-	1
			Trenance	Trenance Cottages (Grade II)	-	1

<sup>6</sup> For the definition of “pipeline” projects used in this report, please refer to the footnote in the section “Part 1: Context”.

Authority	Local authority	Local BAR Register	Active BPTs	Projects in pipeline	BaR on EH Heritage at Risk Register 2011 being tackled by BPTs	Other historic buildings being tackled by BPTs
County	Devon County Council	n/a	County Trust: Devon Historic Buildings Trust	Tavistock Guildhall Grade II* (+ 3 other potential projects not specified)	-	1
Devon	East Devon District Council	Yes	Poltimore House	Poltimore House BaR Grade II* (EHR)	1	-
	Exeter City Council	Yes	Exeter Canal and Quay Trust	60 Haven Road, South Warehouse (Grade II); MacLean's North Warehouse (Grade II)	-	2
			Exeter Historic Buildings Trust	Dissenters Graveyard (Local List)	-	1
	Mid Devon District Council	No	Coldharbour Mill		-	-
			Cullompton Walronds	Walronds, Cullompton BaR Grade I (EHR) (with Vivat Trust)	1	-
	North Devon District Council	Yes	Barnstaple Buildings Preservation Trust	Catholic Church (Grade II)	-	1
	South Hams District Council	Yes	Totnes and District Preservation Trust	Brunel Building, Creamery Site (Grade II)	-	1
	Teignbridge District Council	No	None		-	-
	Torrige District Council	Yes?	Great Torrington Buildings Preservation Trust	Great Torrington Town Hall (Grade II)	-	1
West Devon Borough Council	No	None		-	-	
National Park Authority	Dartmoor National Park	Yes	None		-	-
UA	Plymouth City Council	Yes	Barbican Trust		-	-
			Ford Park Cemetery		-	-
UA	Torbay Council	Yes	Lupton Trust	Lupton House BaR Grade II* (EHR)	1	-
County	Dorset County Council	n/a	None		-	-
Dorset	Christchurch Borough Council	Yes	None		-	-
	East Dorset District Council	No	None		-	-
	North Dorset District Council	Yes	None		-	-
	Purbeck District Council	Yes	Swanage Pier	Marine Villas, Swanage Pier (Grade II)	-	1
	West Dorset District Council	Yes	Beaminster Museum Trust		-	-
Bridport Area Development Trust			Bridport Literary & Scientific Institute BaR Grade II* (EHR)	1	-	

Authority	Local authority	Local BAR Register	Active BPTs	Projects in pipeline	BaR on EH Heritage at Risk Register 2011 being tackled by BPTs	Other historic buildings being tackled by BPTs
Dorset	West Dorset District Council	Yes	Landmark Trust (having a national geographic remit)	Belmont House, Lyme Regis (Grade II*)	-	1
			Lyme Regis Development Trust	New Natural History Museum (New Build)	-	1
			Lyme Regis Town Mill Trust		-	-
			Sherborne House Trust	Sherborne House BaR Grade I (EHR)	1	-
	Wolfeton Riding House Trust	Wolfeton Stables BaR Grade II* (EHR)	1	-		
	Weymouth and Portland Borough Council	No	None		-	-
UA	Bournemouth Borough Council	No	None		-	-
UA	Poole Borough Council	No	None		-	-
UA	North Somerset District Council	No	Birnbeck Regeneration Trust	Birnbeck Pier project (project stalled)	-	-
County	Gloucestershire County Council	n/a	None		-	-
Gloucester-shire	Cheltenham Borough Council	No	None		-	-
	Cotswold District Council	Yes	None		-	-
	Forest of Dean District Council	Yes	Gunns Mill Trust	Gunns Mill (new Trust) BaR Grade II* (EHR)	1	-
			Hartpury Heritage Trust	Old Village Reading Rooms (LL?)	-	1
	Gloucester City Council	Yes	Gloucester HBT		-	-
			Llanthony Priory Trust	The Range BaR Grade I (5 buildings) (EHR)	5	-
	Stroud District Council	Yes	Stroud PT	Brunel Goods Shed BaR Grade II* (EHR)	1	-
Woodchester Mansion			Woodchester Mansion (Grade I)	-	1	
Tewkesbury Borough Council	No	None		-	-	
UA	South Gloucestershire Council	Yes	Kingswood Heritage Trust	(with Avon Industrial BT): Warmley Brassworks CAaR (EHR)	-	1
			Winterbourne Medieval Barn Trust	Winterbourne Medieval Barn (Grade II*)	-	1
National Park Authority	Exmoor National Park	No	None		-	-
County	Somerset County Council	n/a	County Trust: Somerset Building Preservation Trust	(with Vivat Trust): Castle House, Taunton Castle (Grade I)	-	1
Somerset	Mendip District Council	Yes	Frome Historic Buildings Trust		-	-
			Shepton Mallet Amenity Trust		-	-

Authority	Local authority	Local BAR Register	Active BPTs	Projects in pipeline	BaR on EH Heritage at Risk Register 2011 being tackled by BPTs	Other historic buildings being tackled by BPTs
Somerset	Sedgemoor District Council	Yes	SAVE Britain's Heritage (having a national geographic remit)	Castle House, Bridgwater BaR Grade II* (EHR)	1	-
			Halswell Park Trust		-	-
Somerset	South Somerset District Council	Yes	Coker Rope and Sail Trust	Dawes Twine Works BaR Grade II* (EHR)	1	-
			Somerton BPT	Somerton Old Town Hall (Grade II)	-	1
	Taunton Deane District Council	Yes	Tone Mill Trust	Tone Mill BaR Grade II* (EHR)	1	-
			Wiveliscombe Town Hall Trust	Wiveliscombe Town Hall (Grade II)	-	1
West Somerset District Council	No	Dunster Tithe Barn Community Hall Trust		-	-	
UA	Swindon Borough Council	No	New Mechanics' Institution Preservation Trust	Mechanics Institute BaR Grade II* (EHR)	1	-
UA	Wiltshire County Council	Part	County Trust: Wiltshire Historic Buildings Trust	Barn at Derriads Farm, Chippenham (Curtilage Grade II); 47 Blue Boar Row, Salisbury (Grade II)	-	2
			Bradford on Avon Preservation Trust		-	-
			Melksham Town Trust		-	-
			Ramsbury Memorial Hall		-	-
			Vine Project		-	-
			Warminster Preservation Trust	Warminster Town Hall (Grade II)	-	1
<b>Total:</b>					<b>24</b>	<b>24</b>

Table 9: Pipeline projects by BPT, local authority area and building classification

<p><b>Index</b></p> <p>BaR: Listed building at risk included on the English Heritage <i>Heritage at Risk Register 2011</i></p> <p>CAaR: Conservation Area at risk included on the English Heritage <i>Heritage at Risk Register 2011</i></p> <p>EHR: English Heritage <i>Heritage at Risk Register 2011</i></p> <p>HER: Historic Environment Record</p> <p>LL: Locally listed historic building not on the statutory list</p> <p>SM: Scheduled Monument</p> <p>UA: Unitary Authority</p>
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When asked to identify factors of success for delivering projects, the Trusts included in the face-to-face interviews ranked them as follows:

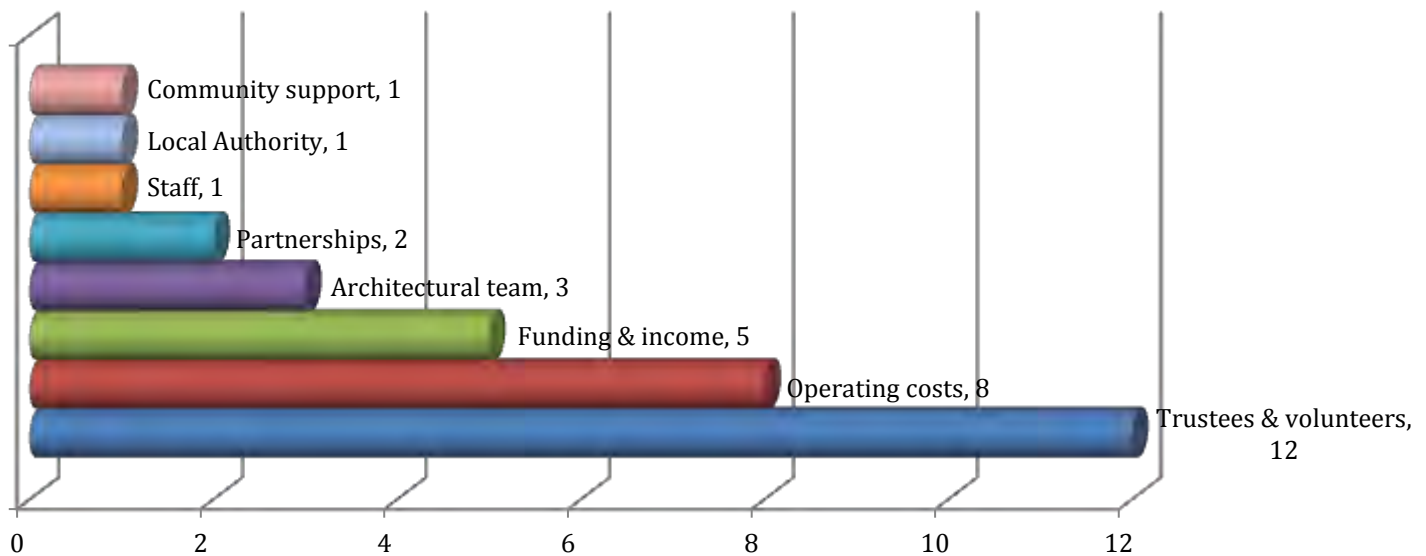


Figure 15: Success factors for project delivery

Other factors included:

- *Good project management. Ideas - deciding which of the options to take.*
- *project manager*
- *Small projects, fairly simple to restore and sell on, manageable*
- *Using direct labour rather than main contractor  
Good carpenter foreman, finding right kind of craftsmen. Doing much supervision personally for free.*
- *Small End users - some buildings put back into housing stock and made a revolving profit. Small-scale domestic properties - low risk*
- *Ability to be flexible in negotiations with developers and occupiers, political direction, clarity of purpose (closure of Maritime Museum)*
- *Tenacity of key person to drive project - dealing with authorities, dealing with funding, English Heritage, having squatters, builders going bankrupt. Having a team of willing people to know how to deal with maintenance and public access.*
- *Hard work*

- *Someone to organise and chase funds Able set of Trustees is critically important. Connections, networking.*
- *Planning ahead knowing market place. Work with volunteers recovering from addiction*
- *Entrepreneurial spirit, fortitude*
- *Getting the money, having the right project manager and the right architect. The admin person has got to be consistent and hardworking (although very often don't get any money at all for it, or very little). Chairman project managing current project. Good established relationships with funders.*
- *Light bureaucratic touch, desperate need for building stock in the centre and edges of Stroud*
- *Goodwill, cooperation from authorities, interest shown by the local community in supporting projects*
- *mentoring by Wiltshire Historic Buildings Trust*
- *Good pre options appraisal - small group of Trustees looking at potential and able to recognise potential*
- *Good relationship with English Heritage locally.*

To conclude Issue 11: The impressive portfolio of projects together with the attributes listed above demonstrate a real appetite amongst 40 BPTs to address Buildings at risk in the South West. In delivering these, BPTs would help to fulfil the strategic aims of other stakeholders such as English Heritage (through the National Heritage Protection Plan, NHPP), funders such as HLF (by delivering comprehensive conservation, community participation and learning outcomes), LPAs (by addressing Buildings at Risk Strategies) and Government (by exactly and actively aligning with the Localism agenda). A key recommendation of this report is therefore to ensure that all those with an interest in supporting and furthering the BPT movement in the South West should focus on a strategy and methodology for assisting Trusts to deliver this dynamic programme of projects in line with their own strategic objectives.

## KEY ISSUE 12 (relating to project delivery): DEFINING & OVERCOMING BARRIERS TO PROJECTS

Achieving successful outcomes and delivering the portfolio of projects entails recognising that there are hurdles to be overcome. Barriers to progressing projects (more than one might apply to each of the 18 projects) identified by Trusts include:

- (i) Finance
- (ii) Time availability of members of Trust to manage the project
- (iii) Acquiring the property
- (iv) Gaining support of the LPA
- (v) Identifying a new use including finding suitable occupiers

### Stalled Projects

In the face-to-face interviews, when Trusts were asked 'since 1985, have any of your Trust's projects failed or stalled?' 9 Trusts out of 24 had experienced this.

These included:

- *Avon Industrial Buildings Trust*  
Middle Engine Pit, Nailsea, North Somerset  
Reason: Unable to acquire difficulty with local council - North Somerset
- *Bristol Buildings Preservation Trust*  
35, 37 and 41 Stokes Croft  
Reason: Lack of funding  
Had hoped to include them in a Townscape Heritage Initiative but were not included. Problems with planning policy - wanted retail uses on the ground floor. Was working with a housing association that didn't want to look after retail users.
- *Devon Historic Buildings Trust*  
1 The Esplanade, Plymouth  
Reason: Esplanade gazumped  
Hoe Barn, Plymouth  
Reason: 'other'
- *Exeter Canal & Quay Trust*  
Canal basin regeneration  
Reason: Credit crunch. Had extensive

Other difficulties include:

- *compliance with funder's reporting requirements - very difficult in project implementation phase - held up getting funding. Now resolved but very frustrating.*
- *ageing membership*
- *no phases. Have acquired the building in derelict state and the only plan is to stop it deteriorating. Partly useable*
- *viability of current plan needs to be kept under review, working with University of Exeter to support and develop plan. Viability is very difficult to test in changing economic circumstances*
- *understanding funding procedures, having expertise at hand. People having to focus on earning a living rather than donating time.*
- *problems with planning department about design of refurbishments - 'too Victorian' want something different*
- *still trying to get planning permission in order to apply for funding*
- *difficult for any community organisation to take on a listed building and deal with conservation department and planning etc without some professional help. Not understanding terminology etc - continuing problem with building regs*
- *need for a closer working relationship or partnership between Trust and local authority. Mentoring would be really helpful.*
- *Warminster PT has 'tried over the last 9 years to acquire a couple of buildings but couldn't find a project.'*
- *very dependent on one person to organise projects*
- *too much money spent on pre-options - too much spent on consultants.*
- *need less bureaucracy requirements by funders - causes cashflow problems, which means project has to borrow which increases costs*



amount of pre-work on planning side, had an adopted master plan as special planning guidance, got some exceptional architecture and financial offers from a lot of developers, but ran into credit crunch. May be able to start again.

- *Hartpury Heritage Trust*

Old chapel

Reason: Foot and mouth disease outbreak during Old Chapel project, then prices went up and couldn't keep up with timescales - held project up 2 years

- *Stroud Preservation Trust*

Brunel goods shed

Reason: Unable to find viable new use 20 potential end users (5 major ones) over Goods Shed. Have now in 2011 succeeded in finding an end user and just signed a 5 year lease.

- *Walcot Street Trust*

Corn Market Walcot Street, Bath

Reason: Unable to acquire and lack of funding

Did options appraisal and business plan for Corn Market, Walcot Street, Bath (2005-7)

- *Wiltshire Historic Buildings Trust*

former Assize Court, Devizes (on the EH *Heritage at Risk Register 2011*)

Reason: Unable to acquire

Mediaeval lodging range, Brookhall near Westbury (on the EH *Heritage at Risk Register 2011*)

Reason: Unable to acquire

Other key barriers to progressing projects included the following:

#### VAT

- *Have had a big problem with VAT - the legislation is arcane. The resolution of our status has set our project back 9 months. Have had to take on VAT consultant, two HMRC inspections - highly technical.*
- *VAT: the impact of VAT on bills for repairs is a huge disincentive. We gain 28% on gift aid, but pay 20% on any work or service done. Although registered for VAT, much is not eligible for reclaim. To clarify and simplify VAT charges on historic building repair would be very helpful to small BPTs such as Poltmore House.*

#### Lack of Partnership Agreement

- *Hope for a historic management agreement with English Heritage to reduce bureaucracy in getting consents. It has been agreed that Llanthony Secunda Priory will be a pilot for English Heritage; however legislation hasn't yet been passed to allow this to happen.*
- *Restriction into preferred developer lists - lack of innovation.*

#### Legislation

- *Ancient monuments and listed buildings are currently separated in legislation. Heritage protection reform will make processes a lot easier. Need the legislation.*
- *Need stronger listed building/planning legislation. There have been several buildings which could have been taken on by a BPT but planners have decided in favour of developers.*
- *Should be disincentives for people to buy listed buildings, demolish and leave space empty.*
- *Compulsory purchase of historic buildings at risk. Legal costs and complexity of CPO is a problem. Some conservation officers and EH officers need to be more aware of the commercial reality of developing historic buildings for long terms use. 'Creative Conservation' - as published by EH in last few years has made things better, but still don't fully realise that BPTs are property developers who have to work within confined financial frames and timescales.*

In the survey of LPAs, out of a total of 33 responses, 15 had served an Urgent works notice, 11 had served a Repairs Notice but only 4 (or 12.1%) had served a Compulsory Purchase Order. A quarter of respondents had served none of these

When Trusts were asked 'Are there any alternative mechanisms for organising projects that could support your Trust?' the responses were:

- *working with another larger archaeological Trust such as Bristol Industrial Archaeological Society - may be able to access skills such as legal, marketing and networking.*
- *Manpower Services Commission type scheme to provide labour*
- *partnership working with more established partner with more resources e.g. housing association, council, development Trust. BPT could be a partner bringing in particular expertise, getting a fee or share of profit.*
- *might use conservation volunteers if appropriate, Boy Scouts etc*
- *Trust has used connections with the College for support for a whole range of things that students have done - site clearance, logos etc*
- *it would be better if we could assemble teams to develop projects rather than relying on volunteers*
- *taking on small projects to collect up the small amount of funding to cover admin costs. Full cost recovery.*
- *could be a bigger mentoring scheme through UKAPT*

To conclude Issue 12: Apart from tackling longer-term structural problems requiring a shift in government policy (VAT, legislation), Trusts in the South West identified a range of barriers to undertaking and delivering projects – these tended to revolve around personnel – e.g. difficult owners, difficulty in forging the right partnerships (particularly in local authorities) – and resources – to sustain the Trust while the project was being developed. Two other principal barriers to be overcome revolve around injections of funding at essential points in the project and the time availability of members to manage the project. These are both addressed in the following sections.

## KEY ISSUE 13 (relating to project delivery): PROJECT MANAGEMENT

### Management of Projects

Of 15 projects:

- 12 had been completed in-house, by a volunteer member
- 1 had been completed in-house, using a paid member of staff
- 2 had been completed externally, using an architect

Management of current projects follows a similar trend. The majority are being managed in-house, by a member of the Trust, working on a voluntary basis (16); two are being managed in-house by a member of the Trust, on a paid basis. Two are being managed externally by an architect or surveyor, while two are being managed externally by a project organiser or another professional

In the face-to-face interviews, three Trusts (Hartpury, Lyme Regis Development Trust and Stroud Preservation Trust) managed projects for other organisations. However, only one project (Guns Mill) was currently in the pipeline.

### Use of Project Organisers

In terms of project organisers, two Trusts had never used them. The remaining Trusts had used the following:

- A Trustee of our Trust: 15
- An external consultant: 10
- An employee of our Trust: 4
- A seconded Council officer: 2
- Other: 4

Comments on project organisers included:

- Ex local authority engineer was paid
- Have a technical advisor for historic grants scheme which the Trust provides.
- Someone experienced in fundraising - got funding for an exhibition, current project leader on Literary and Scientific Institute. Produced plans and planning documents. Pro bono basis. Now about to advertise for this post - preparing job description.
- Experienced retired conservation person currently acting as project manager/organiser on current project
- Had an AHF grant for project organiser. One of our Trustees stood down and was paid.
- Difficulty in relationship between Trustee project manager and higher project manager. Difficulty with cashflow - don't want to hand over responsibility for payments to external project manager.
- Own internal project organiser working on our last completed project - Cricklepit Mill

- Project managers are all in house
- The Trustee was paid but donated all the money back to EHBT
- Had project organiser for St Michael's Tower project led by Civic Trust. If current conservation officer paid by Gloucester Historic Buildings were to undertake project organisation - would need more time. A number of Trustees would potentially have the time.
- Long term revenue grants would be very helpful. Currently have a project officer part funded by AHF. This will finish quite soon - has been very helpful in organising community work. No long term continuity with that at present.
- Varied experience - some people have ideas but can't deliver them. Have access to 3 or 4 professional project managers who we can bring on a project on pro bono basis.

- Conservation architect provided project management. Paid for through architect's fees. Need the ability to operate with a host of organisations.
- In kind support from professionals outside of the Trust
- Have project officer with help of AHF grant/universities internship programme for new graduates
- Had a mentor from SSVCA - South Somerset Voluntary Community Association
- Until 2006 a Trustee has usually stood down from Trustee post and been paid to project organise. After 2006 employed someone 2 days a week. Wanted a fresh face as Goods Shed was stalled. Wanted good publicity and profile raising and funding applications written. Did a proper equal opps application process. Funded through AHF money. This person is now a Trustee.
- Coal canal project - two people saw the project through

- Project organiser is architect and former team leader of urban design and conservation team.
- The project organiser's background was heritage property management.
- Generally have good project management skills but suffer from lack of capacity and resources at times.
- English graduate from University of Exeter filled the project officer role. Very good at networking and has brought skilled volunteers.
- On gardens project employed an external consultant, part of services provided through architect fees. Applied for funding to include this service conservation architect
- Access professional skills outside the board from local companies and supporters in areas such as accountancy, property management, conservation, ICT etc.

The particular model adopted by Somerset HBT stands out:

- Broad and senior management in building industry including restoration of historic buildings in the past. Conservation Officer (for Somerset County Council). Administration and management at senior level and adult education facilitator. The latter is the deputy project manager. This creates a very strong team.

### Skills of Project Organiser

In terms of the primary expertise of the person fulfilling the role of project organiser, the ranking was as follows:

- Business management, fundraising, project management: 15
- Architect, Designer: 5
- Community regeneration: 5
- Teacher or lecturer: 3
- Structural, Mechanical, Electrical, Civil or IT Engineer: 2
- Town Planner, Planning officer, urban design: 2
- Audience development, heritage interpretation, tourism: 2
- Public relations, sales and marketing, journalist: 2
- Conservation Officer: 1
- Lawyer: 1
- Finance: 1
- Other: 4

Comments on skillsets needed include:

- Key skills are relevant professional expertise (architect for building project) but for the project we are now contemplating of restoring a large Victorian machine, a mechanical engineer. Needs ability to project manage, fundraise and diplomacy.
- Hard to find people with skills to fill this role. Business planning side is hard to find. Need to understand figures. Need to be good project managers, good at communication, able to set up community events, understand facts and figures and funding applications. Would be better to retain a project officer part time continuously working for the Trust in order to retain skills. Need different skills at different points in a project.
- Were obliged by funders to have project manager, CDM, QS. Interviewed candidates with Vivat Trust and chose external project manager. However you have to fit into their time scheme.

None mentioned the following:

- *Landscape, environmental conservationist*
- *Archaeologist*
- *Historian, building historian*
- *Craft skills*

The majority of Trusts were satisfied (whether the whole project or part of the project) their Project Manager had all the skills required to deliver a successful project. 3 Trusts were not happy, 3 didn't know.

The skills gaps identified were:

- *Understanding the project vision: 1*
- *Fundraising and bid writing: 1*
- *Financial management: 1*

Comments included:

- *Sometimes not just skills are lacking, can be vision or knowledge.*
- *Have recently undertaken a skills audit using tools and support via Development Trusts Association which has highlighted we could be stronger in financial management and planning.*
- *Employed Project Officer has self trained when needed, but some skill gaps.*

When asked 'how useful would a skilled project organiser be' the response was as follows:

	Not useful	Of limited use	Useful	Very useful	Unable to do without
<b>Undertaking a current project</b>	1	7	1	13	2
<b>Stimulating your Trust to undertake a new project</b>	2	4	4	12	2

Table 10: Perceived value of a skilled BPT project organiser

One Trust commented: *'Project organiser would be very helpful - more time on the ground to promote, market and help chase funds.'*

To conclude Issue 13: The need for skilled project organisers comes through clearly, but there is a strong perception that the role achieves more if it is bedded in the Trust undertaking the project; otherwise capacity building opportunities may be missed. Equally, however, there is potential to ensure project organiser skills are transferred to other projects, but at present there is no guarantee that such skills will benefit other BPTs, as opposed to other third sector groups. This is particularly so with the trend identified in earlier sections of this report towards single-project Trusts, away from the revolving-fund model. This issue is dealt with in Key Issue 16.

## KEY ISSUE 14 (relating to project delivery): FINANCING PROJECTS

### Principal Funders

As regards principal funders for projects (again, more than one funder might be involved), out of 22 responses:

PROJECT FUNDING	
Local Authority Grant	9
AHF Grant	9
HLF Grant	8
Trading Income	7
EH Grant	6
Investment Income	6
Grants: Other Sources	6
Gifts and donations	6
Sponsorship and local fundraising	3
Staff seconded	2
Pro bono work and volunteering	2
Central government grant	2
Membership subscriptions	2
Landfill Communities grant	1
EU Grant	1
Other	13

Table 11: Sources of project funding

The prominence of local authority grants is noticeable and a cause of concern given the present cutbacks. The table demonstrates the complexity of project funding, in terms of applying to many different funding bodies, but also in gaining a mix between externally-sourced funding and internally generated income.

### Other Funders

The large number of 'Other' funders includes:

- *Brownsword Charitable Foundation, investigating others, educational charities*
- *Trevor Osborne Group, Prince's Regeneration Trust, Quartet*
- *Unspecified (2)*
- *Prince's Trust1, local individuals*
- *sale of valuable picture*
- *Avon Industrial Buildings Trust contributed, looking for self sustaining business model for site with community use as well*
- *Town Council might give money if property goes to auction, Wiltshire Council possibly, Area Board, Wiltshire Historic Buildings Trust hopefully*

- *no main funder, raise small funds here and there. Council are demanding a sustainable business plan, the council might then enter into a discussion to lease the site on a long lease. Forming a subgroup to look at applying for funding including possible project organiser*
- *RDA (now abolished)*
- *DEFRA*
- *Country Houses Foundation*
- *income from renting out rooms, English Heritage money has been promised but have got to match fund it.*
- *Country Houses Foundation, Wolfson Foundation, Exeter Historic Buildings Trust*

- *Enabling development, Redcliffe Homes building houses, Sherborne House will be leased back to Trust by property development company*
- *Friends raising money for marine villas*
- *SITA Trust, Newquay Town Council. Local authority re-roofed building before transferring freehold cost over c.£100,000*
- *Grant from County Council to assist in initial project costs associated with Literary and Scientific Institute. In early stages, very new Trust. Will apply for grants as appropriate. Offer of some money from district council if we take the Chapel on the Beach forward. Trading estate potential project - all voluntary effort.*
- *Grant funding depending on project. Have applied to HLF for Lower Lodge project to pay for repairs and conversion.*
- *This Trust has in the past used Manpower Services Commission direct labour. This Trust has substantial funds. Has taken AHF loans. Initially BVEG made money from publishing books.*
- *Business Link*
- *The Monument Trust; J P Getty Jnr Charitable Trust; Wolfson Foundation; Pilgrim Trust; Awards for All; Garfield Weston Foundation; Cullompton United Charities; The Mercers Company; The Leathersellers Company; The Heathcoat Trust; The Society for the Protection of Ancient Buildings.*
- *Going to try and re-animate friends group. Apply for grants for three projects currently under way. Friends group in place locally to those projects to raise money from local basis. Trying to get mentioned in wills - just had one.*
- *Sell things or re-gear leases. Refurbishment of remaining two listed buildings in the portfolio - MacLean's warehouse, and 60 Avon Road - predicated on granting long leases of those properties, which would then receive capital sums from the developer. Reinvest in projects in canal area.*

- *Small grant from Exeter Arts Council to put on mediaeval workshop*
- *Have applied for funding in past for St Oswald's Priory (2003-4) inc English Heritage and Wolfson Foundation*
- *Gloucestershire Environmental Trust, Summerfield Charitable Trust for archaeological works. Generate income from screening films in grounds in summer.*
- *Number of buildings on the site that we propose to work with, restore or build anew. Uses for Carriage Works - Youth Hostel Association style hostel, training kitchen, restaurant bakery. Approached AHF for funding for surveying but wasn't successful. Apply for grant funding as appropriate but find commercial loans easier.*
- *Projects in the pipeline will generate income. Have strategy in place to do that.*
- *Applying to HLF for funding to support interpretation of Railway Village. Applying for funding with full cost recovery. Took over lease of large historic building - operated as community and cultural hub - generated income. Provide infrastructure for other voluntary and community organisations, other heritage organisations.*
- *Wolfson Foundation, Poltmore Revival Fund, Big Give Challenge, Give a Slate campaign. Working with Shilhay community - Exeter based charity for the homeless. Want to become more commercial. Getting MBA students to investigate various social enterprises. (However none of the above will pay salary of project officer. Have had grant for feasibility study, been quite successful so far)*
- *Environ Trust. Applying for grants for railway heritage.*
- *Town Council*

The wide range of funding sources is a reminder that from a Trust perspective, no single funder has a 'controlling' hand in their delivery.

### **Possible Funding Sources**

Areas of possible funding for BPT projects not specifically mentioned within the survey responses include:

- *Shares and Bonds issue*
- *Property disposal*
- *Commercial loans*
- *Grants from other BPTs*
- *Esmee Fairbairn*

## The Funding Climate

As regards perceptions of 'how has the funding for your Trust and your Trust's projects changed over the last ten years?' one Trust stated they were finding it easier, 15 stated they were finding it harder, 3 thought there had been little change, 3 didn't know and 1 didn't answer.

In terms of funding bodies supporting or hindering the role of Trusts, a high percentage (17) considered they were supported, 5 stated the funding bodies neither supported or hindered their projects.

### Comments on funding include:

- *The Trust is generally now self financing from renting property.*
- *English Heritage money has dwindled away*
- *HLF demands far too much expensive and worthless information. Money spent on documents which could be spent better on repairs. Far better to have EH handling Lottery money.*
- *Had EH grants, local govt grants. Had disappointment with AHF - wouldn't use again. Small sums of money - not worth the hassle of application. Don't fund projects done in partnership. Options appraisal for AHF has to precisely match criteria otherwise not accepted. HLF - turned down twice.*
- *Only funding body which provides real help is HLF - have had good support from mentoring process. Particularly interested in work with community. Have a timescale on expenditure of funds for Wolfson and Pilgrim Trust - will affect timescales to use that funding. I regret omitting the Architectural Heritage Fund which has supported, guided us and funded us from the beginning. They are so much part of the project I forget sometimes they are a separate body.*
- *Funds have reduced - don't think we will get a discretionary grant from Devon County Council this year.*
- *Not dependent on external funding. Have a good relationship with English Heritage, but don't ask for money.*
- *Did have a lot of technical problems with English Heritage on conservation philosophy on 21 The Mint. Architectural Heritage Fund were a hindrance - repayment of loan, very large legal fees*
- *Need to match funder with project*
- *RDA was difficult to deal with. A lot of support from funders generally because Trust is relatively 'naive' and amateur based. HLF invited Trust to event to exhibit at it as a volunteer based organisation that was delivering - volunteers can do it. Process of filling in paperwork has become easier in applying for funding. RDA's paperwork was complicated.*
- *Quite difficult to get funding for an 'infrastructure' organisation, rather than single issue. Complex and time consuming funding applications. Would like to move to being wholly self sufficient and own asset base.*
- *HLF have given lots of support and guidance - applying for small grant for interpretation. Community Builders appointed specific people to deal with - finance, health checks - well resourced, cost nothing. Several funds have recognised our relationship with local authority is hindering our ability to access their funds.*
- *Funders are supportive, and need evidence that the Trust is managing the project effectively. Funders do not always appreciate the priorities within the project, e.g. funders wish to fund the visible and glamorous elements of the project, when the roof and infrastructure is a priority. Also funders reluctant to fund 'up-front' which, while understandable, creates huge cashflow difficulties for the project.*
- *Much more paperwork. HLF activity plans hard to devise and burdensome. Can work so hard on application and possibly not get funding.*
- *If they agree to fund then they're very helpful. Bit too much red tape.*
- *Funding applications can be time consuming and complicated, too much duplication*



## Funding Gaps

When asked to identify gaps in the funding available for specific projects:

	Yes	No	Don't Know	Total
<b>Pre-options appraisal work</b>	6	8	3	17
<b>Options appraisal</b>	7	9	2	18
<b>Project development between options appraisal and project delivery</b>	7	6	5	18
<b>Project delivery</b>	3	11	4	18
<b>Post Project Delivery</b>	2	11	5	18
<b>Project administration</b>	4	10	4	18
<b>Other phases in a project</b>	3	11	4	18

Table 12: Gaps in funding project phases

## Funding Challenges

Other comments on funding include:

- *On project administration - rely on people doing a lot of work for nothing. Charge notional admin costs - people charge for business and then donate money back.*
- *Need to be able to access funding more quickly. All stages difficult, but finding funding for project delivery is most difficult*
- *Cashflow can be a problem. Short of money to complete - may have to raise a mortgage.*
- *Our Trust is fortunate to have skills available among the Trustees to be able to carry out pre-options appraisal ourselves otherwise there would be a gap here.*
- *Earliest stages are the hardest*
- *Cashflow is a problem.*
- *People are interested once you've got planning permission, however before that stage it's quite difficult to get funding for projects.*

- *Project development phase has been really important - full team with engineer, quantity surveyor, CDM coordinator, architects, asbestos, bat consultants - have had to do all that work without any payment from English Heritage grant. Drew up document, borrowed money from Trustees or friends of Trustees on no interest basis, however managed to get an overdraft, but this costs money. Receipt of legacy saved the cashflow problem. Project admin is a full time job - currently unpaid.*
- *If everything works there aren't any gaps on our particular projects, and there haven't been in the past. When we did the Hospital was never money to go into administration or anything like that, we were stretched to the limit just to get the project done. However current Castle House project all okay so far.*
- *Rapidity in which you can access funds, particularly in early stages is a problem though all stages difficult*
- *Because the Trust has funds it is able to cover expenses which might otherwise cause a cashflow problem before grants come on stream.*

To conclude Issue 14: Financing is a key issue for many projects. This section demonstrates the wide variety of sources that are being tapped into. Given the prevailing economic conditions of austerity, projects are more likely to succeed where Trusts can draw on internally-generated funds, and where a robust Trust infrastructure gives a sense of confidence to investors. The challenge to progress a project is therefore greatest for those Trusts that are entirely reliant on external funding.

## **KEY ISSUE 15 (relating to project delivery): PROJECT EVALUATION**

Past projects undertaken by Trusts in the South West have delivered innumerable benefits. The nature of these benefits – social, economic, environmental and cultural - has been identified in other Reports, so it is not intended to repeat examples here. However, in reality, very little systematic collection of data or measurement of outcomes has taken place.

Only four of the Trusts in the face-to-face interviews had a formal method to evaluate a project.

- *As set out in the HLF guidance*
- *do financial appraisals using same software and project management packages as city council does*
- *Visitor comments*
- *Evaluate in house according to funder requirements*

Given that

- a) funders and other stakeholders would benefit from feedback on their involvement in the case and
- b) the BPT movement as a whole needs to identify and demonstrate the benefits that have flowed and will flow from undertaking projects, it is a concern that so little evaluation work is undertaken.

To conclude Issue 15: The lack of consistent detailed evaluation of BPT projects is a major cause of concern, within the South West and nationally. The current portfolio of projects being developed in the South West would provide an excellent resource for carrying out a wide-ranging evaluation exercise, the results of which would help to inform future bids for funding and would provide a powerful tool for raising the profile of the BPT movement, locally and nationally.

## KEY ISSUE 16 (relating to project delivery): TRANSFER OF SKILLS

The major area of concern to emerge from this report is that there is currently insufficient momentum and infrastructure within the BPT movement to ensure skills are being both acquired and passed on, and that, particularly where organisations only undertake a single project, then the skills and expertise tend to be dissipated. However there would appear to be a resource of expertise within single-project Trusts that could be tapped into, indicated by a broadly positive response to the question: 'Although you've indicated that your Trust is not interested in undertaking new Building conservation projects, would Trustees or members of your Trust involved with past or current projects be willing to assist future projects undertaken by other Building Preservation Trusts, for example as a Project Organiser or Mentor?'.

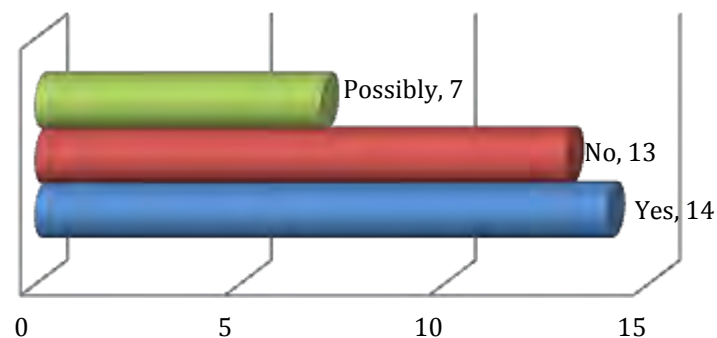


Figure 16: Willingness to become BPT Project Organiser or Mentor

Multi-project Trusts, when asked 'does your Trust have a process for carrying skills and expertise from one project to another, either to another project by your Trust or by a different Trust or organisation', stated that continuity was principally provided by Trustees.

Other ways in which skills were transferred include:

- *try to help and advise other Trusts, and give grants*
- *within main building contract there will be places for trainees and apprenticeships in conservation skills*
- *internal skills and experience passed on*
- *continuity of staff - city council staff resources always available.*
- *also keep the same architect*
- *continuity of volunteers*
- *work closely with Swindon Civic Trust - share skills across organisations*
- *very young Trust, but would carry forward same Trustees to new projects*
- *continuity of Trustees, renew with appropriate Trustee*

To conclude Issue 16: The current project portfolio has generated and will continue to generate a reservoir of skills and expertise which should be harnessed, developed and passed on to other practitioners and projects. There are clearly many other ways in which skills could and should be transferred; this is explored further in Part 3 of the report (Activity 2).

### **Part 3: Moving Forward: Proposed Activity Plan**

This section recognises that all active Trusts (both those pursuing new projects and those managing completed projects) currently require:

- guidance and assistance as to how to strengthen their operational models (ACTIVITY 1); and
- stronger stakeholder networks to build capacity (ACTIVITY 2).

Trusts currently undertaking projects require:

- better support, information and advice for taking their current projects forward (ACTIVITY 3).

Some Trusts have the capacity to enhance their operation by:

- converting some of their pipeline projects into 'pilot initiatives' (ACTIVITY 4).

Finally, there are a range of initiatives BPTs would like to explore:

- what is the scope for supporting these initiatives and equally, given the appetite for undertaking additional work and projects, is there scope for forming new Trusts in the South West (ACTIVITY 5)?

Recommended follow-on actions are made under each of the above Activities. The Project Board that has steered the production of this study could provide a valuable ongoing role to encourage implementation of the actions and monitor their success, providing continuity and increasing the prospects for a long-term legacy. A positive development has been the establishment of a new post of Heritage at Risk Support Officer for the South West, funded jointly by EH and AHF, although the precise outcomes are, at the time of writing, not yet finalised. The effectiveness of that post and of ongoing work of the Project Board would be enhanced by broadening the Board's membership to include that new post holder along with other key stakeholders; e.g. the Heritage Lottery Fund, Locality, Homes & Communities Agency, and a Conservation Officer (or other representative officer) from each local planning authority or from selected areas in the South West, if resources allow. The purpose of the Project Board should be to focus on actions within the South West of England, though the outcomes and data collected will be of relevance to BPTs in all parts of the UK.

## ACTIVITY 1: NEW MODELS OF WORKING

This section

- 1) examines whether the revolving fund model has a future or whether alternative models such as retaining assets can provide greater long-term security; and
- 2) explores new funding opportunities.

### 1.1 Revolving Fund Approach

This study has already provided evidence to suggest that the revolving fund model is, in many cases, failing to provide a workable framework for Trusts, despite the fact that many have been established on that basis. When asked 'has the recent experience of your Trust been that current funding structures mitigate against revolving fund structures (i.e. using a surplus from a completed project to invest in the next building conservation project), for example by preventing the retention of any financial surplus at the end of the project?' of 16 recorded responses:

- 5 Trusts felt it mitigates against revolving fund structures
- 3 that it assists the revolving fund process
- 5 stated they 'didn't know'
- 3 did not answer the question.

Further comments on this point were:

- *Don't wish to elaborate on record*
- *Agree with recent article in APT News. Experience with the Heritage Lottery recently - every penny has to be accounted for on project spend, if there's any excess you have to give it back or you can't draw it down in the first place. If at the end of the day you want to sell the building you know you're going to have to give a bit of that grant back. If you're going to sell the building you probably wouldn't get a grant in the first place. No possibility of using public grants to effectively make private profit - rules out the possibility of revolving Trusts.*
- *Find it difficult to persuade funders that they should be funding the types of buildings acquisitions we've been engaged in. Community Builders, where there is a revolving door element, loan element, price of borrowing through those programmes is more expensive than borrowing through Charity Bank. Not very attractive.*
- *Funding criteria encourage retention of restored building rather than disposal.*

- *Revolving fund projects have become less popular with funding agencies, particularly HLF, on the basis that they wish to see clearly defined community benefits which can't always be demonstrated on a revolving fund project. If you are required to return all of the funds back to the funding agency in the event of a sale without being able to keep a percentage then in the long term the Trust resources decline. Need to ensure that when making applications for grant the cost of the Trust overheads and running are built in. Full cost recovery. At one time that was much more difficult to do because funders for example EH would not pay for that and wanted to claw the money back.*
- *Problem with apparent ability of Charities Commission to obstruct charities trading in their property. ECQT is essentially a property company but has a very limited ability to dispose of assets without having to seek the consent of a third party. Means the Trust can't act as quickly as it would like. This Trust has assets therefore does not have to apply for grants - does not therefore have a problem with revolving fund structures.*

However, contra to the above:

- *Haven't had a problem. If spending all the money on a particular project, manage to move some slightly sideways when required. Don't give money back - either spend it or persuade funders it's good to put it into an allied project; e.g. coal canal project c. £6,000 left over went into a photo project about the canal itself.*
- *Always have gone into a project with an end user in mind. Will facilitate grants and then hand on to the end user. Do manage to take some money from one project to the next. Always made a profit that's been taken on to the next one (except Cricklepit Mill). Always bought for X, sold for Y always been a profit element worked in. The Trust has capital.*

A different way of working is simply to move from one project to another:

- *All our projects are dealt with as "one offs". At outset we arrange to pass the restored building on to a suitable organisation for a token sum, or take a lease for the building period only.*

## **1.2 Retention of Ownership – A Managed Portfolio?**

Retaining ownership of buildings has been a tried and tested route for many BPTs in the past. Examples provided by respondents include:

- *1 Royal Crescent, Bath, Beckford Tower and 16-8 Monmouth Street, Southcote Burial Land and Beezer Maize (Bath Preservation Trust)*
- *Coldharbour Mill*
- *Ford Park Cemetery Buildings*
- *Ramsbury Memorial Hall*
- *Lower Lane Bridge, Shepton Mallet*
- *Brooke Bond Tea Factory*
- *Mill Buildings (Lyme Regis)*
- *Bake House*
- *Haldon Belvedere*

A very high proportion of Trusts questioned in the telephone interviews (13 out of 18) in fact intend to retain ownership of the building when their current project is completed:

- *Llanthony Priory was transferred from Gloucester City Council. The Trust's main problem is cashflow. Once repaired hope to get a tenant to occupy the site. Tenant would pay rent to provide funding to the Trust.*

The advantages of retaining managed portfolios

- *Ensures conservation standards are maintained*
- *Allows for transfer of skills*
- *Provides investment income through sales/leasing*
- *Assets may be sold when property market is favourable*

The disadvantages

- *Management implications and costs*
- *Property rentals might decline*
- *Likelihood of having to negotiate longer loan periods*

### 1.3 Explore New Funding Sources and Opportunities

Trusts are themselves constantly seeking out new potential funding sources – encouragingly, at least 2/3rds provided a positive response when asked if they were aware of new avenues to explore:

- *Aggregates funding*
- *Baring Foundation*
- *Big Lottery*
- *British Canoe Association*
- *Cemex Community Fund*
- *City livery companies*
- *Cloth Workers Foundation*
- *Country Houses Foundation*
- *Environ Trust.*
- *Esmee Fairbairn (x3)*
- *Foster Yeoman (but so far we cannot meet their criteria)*
- *Garfield Weston*
- *Gosling Foundation*
- *Heathcote*
- *J Paul Getty (x 2)*
- *Leather Sellers*
- *Lankelly Chase Foundation*
- *Lord Barnby's Trust*
- *Mercers*
- *Northcote*

- *Performance Reward Grant Scheme*
- *Pilgrim Trust*
- *Princes Regeneration Fund*
- *Railway Heritage Trust*
- *Reaching Communities*
- *RPDE - European funding Small local Trusts*
- *Regeneration funding in Cornwall Big Lottery for community projects*
- *section 106 money*
- *Solar parks*
- *Sports Council*
- *Trusthouse Charitable Foundation*
- *Tudor Trust*
- *Wiltshire Council have somebody who is good at finding funds for particular sorts of projects.*
- *Wiltshire Council Community Foundation for Wiltshire and Swindon - main grants fund Wiltshire Council - Community Area Grants Scheme*
- *Wolfson Foundation (x2)*
- *Business plan thinking in terms of small start up business units, funding from business development areas within Somerset - economic development funds*

- *'Look for locally relevant or topic relevant funders. Targeting once you've got a project.'*

Potential funding sources given by survey respondents:

Another possibility is to re-form Trusts into other legal entities as a way to reduce costs or open up the way to other forms of funding (e.g. by issuing shares and bonds):

- The new legal structure Charitable Incorporated Organisation (CIO) should make accounting easier and cheaper by allowing just one set of annual Return documentation rather than two (i.e. BPTs are required to submit annual Returns to both the Charity Commission and Companies House).
- Legal entities such as Industrial & Provident Societies (IPS), Community Interest Companies (CIC), Limited Liability Companies (Ltd), and Public Limited Companies (plc) can issue shares and bonds but are more restricted in their access to charitable funds.

On the latter point, a two-year action-research programme promoting equity investment in community enterprise, completed in March 2011, has resulted in publication of “The Practitioners’ Guide to Community Shares” (see [www.communityshares.uk.coop/resources](http://www.communityshares.uk.coop/resources)). The guide explains how to raise risk capital for ventures serving a community purpose, and focuses on the use of withdrawable share capital, a type of risk capital unique to co-operatives and community benefit societies, which provides a democratic form of community ownership.

Each form of legal entity has advantages as disadvantages. None of the alternative organisational models are demonstrably better suited to building conservation projects than the BPT model but some features, such as those mentioned above, could make a difference if they applied to BPTs. This is an area that UKAPT and partner organisations could explore and lobby Government on behalf of the sector.

#### **1.4 Reserves**

In line with other regions, a number of Trusts retain sizeable reserves. UKAPT could play a role in working with those Trusts to explore ways by which these reserves could be made to ‘work’ better for rescuing historic buildings at risk.



**Recommendation 1** (regarding BPT models of working):

Further research and development work is required, utilising data from this report and studies of BPT activities in other areas of the UK, to explore the following:

- a) Whether BPTs that retain property are able to sustain a more extensive and successful infrastructure; what are the 'optimum' operating levels for Trusts; the scope for establishing new Trusts or amalgamating existing ones; and what mechanisms could be investigated to assist BPTs in acquiring a portfolio?
- b) Whether converting to other 'vehicles' such as Community Interest Company, Charitable Incorporated Organisation or Industrial Provident Society would increase efficiency, or whether aspects of such organisational models that are advantageous to building conservation projects could instead be applied to the BPT legal entity.
- c) The feasibility of establishing a co-operative method involving relevant Trusts to unlock reserves and raise further investment, as a practical means of stimulating further BPT activity to support the delivery of projects in the South West.

Conclusions reached from that research and development work should feed into appropriate support, advice and guidance to BPTs in order to improve efficiencies and sustainability (see recommendations 2 and 3).

## ACTIVITY 2: BUILDING TRUST CAPACITY

The evidence presented here suggests that identified Trusts in the South West are capable of delivering a structured Building at Risk programme, but this needs to be fully articulated and improvements are needed within the movement internally, and between the movement and external (and emerging new) partners. To enhance their effectiveness and the extent of their impact, Trusts in the area of this study would therefore benefit from assistance to build capacity.

In the face-to-face interviews, when asked 'how do you rate the capacity of your Trust to do what it wants to do', 29.2% strongly rated their capacity; over half (54.2%) felt it was sufficient but could be stronger, and 16.7% rated their capacity as weak.

The following key areas have been identified for improvement:

### 2.1 Strengthen Current Support Networks

Mentoring of new Trusts by more experienced Trusts would be valuable.

- *'Sharing of expertise of SBPT with new, inexperienced BPTs. Currently SBPT is sharing expertise with the Somerset Archaeological and Natural History Society over the restoration of Castle House, Taunton'*

When asked 'Although not undertaking future projects, would Trustees or members of your Trust be willing to assist future projects undertaken by other BPTs, either as project organiser or mentor?', a total of 14 Trusts stated they were willing to participate, and 7 said they didn't know but were willing to ask. 13 stated they would not wish to assist other projects.

Developing an Activity Plan is an essential requirement for all Heritage Grant applications to the Heritage Lottery Fund and an aspect where BPTs with experience could provide significant mentoring support to BPTs less familiar with how to go about it.

In 2011 EH has introduced a focus on industrial buildings, so there may be a potential link-up between the Avon Industrial Buildings Trust and the site specific industrial Trusts, although both industrial examples are difficult projects.

The new post of Heritage at Risk Support Officer for the South West created by EH and AHF could assist with building capacity in the area, although the role is not focused on assisting BPTs in particular, and is prioritizing industrial heritage at risk. It is recommended that close co-operative working between the postholder and UKAPT/SWAPT is a key aspect of the role.

### 2.2 Improve Governance

This report has particularly identified Governance as a key issue that needs to be addressed if Trusts are to move forward with the ambitious portfolio of projects. A targeted, funded programme to develop SWAPT's capability is recommended, including an investigation into the viability of forming a Trustee 'pool', running a series of seminars for Trustees, and introducing a Trustee mentoring scheme, as well as utilising information technology and the new UKAPT website to provide information and advice to support the development of SWAPT as the key vehicle for delivering 2.1 and 2.2

### **2.3 Ensure a Trust Strategy and Supporting Policies are in Place**

This report has also identified that many Trusts lack strategies and do not have policies in place, which are important to ensure they are robust organisations to take complex projects forward.

The introduction of a structured programme of training would assist BPTs with framing forward strategies (to include a fundamental review of 'objects'; are they still relevant?) and policy writing; especially encouraging transfer of knowledge between Trusts using existing BPT skills. Policy templates could be added to the UKAPT website to help Trusts to adopt established good practice in their organisational responsibilities.

### **2.4 Improve Evaluation of Projects**

Given limited available resources, few Trusts are collecting anything more than minimal data on the success or otherwise of their projects, and are not using tools to evaluate the social, economic, environmental and cultural benefits of their projects. Employing more thorough methods of evaluation would enable profile-raising of the sector through publicity and lessons learned to be applied to future projects by that Trust and by other Trusts. This latter point is particularly relevant given that most Trusts undertake just one or a small number of projects.

**Recommendation 2** (regarding building the capacity of BPTs):

UKAPT and SWAPT should work with AHF, EH, HLF, and other relevant partner organisations (e.g. Locality, South West Forum, etc) to introduce a structured training and development programme; comprising a mix of training seminars, website support and advice, covering the following aspects.

- (a) Strengthening governance of trusts, to include trustee recruitment and succession planning, investigating the potential for a trustee 'pool' and trustee mentoring scheme.
- (b) Assisting BPTs to frame their forward strategies and put requisite policies in place.
- (c) Business planning.
- (d) Production of marketing and communication plans.
- (e) Methodologies and techniques for evaluating projects. UKAPT should also consider establishing an evaluation service for BPTs, working closely with funders to encourage more feedback from projects in the South West and to structure this in such a way that it assists in raising the profile of BPTs and in communicating between BPTs about lessons learned from projects.
- (f) Finance and fund-raising, to assist BPTs with formulating bid proposals, ensure they are up-to-date with funding sources and providing the necessary expertise, advice and support to ensure both core and project funding opportunities

### ACTIVITY 3: DEVELOPING AND CO-ORDINATING SUPPORT, INFORMATION, ADVICE

BPTs look to various bodies for support. Their rating of four key providers is as follows:

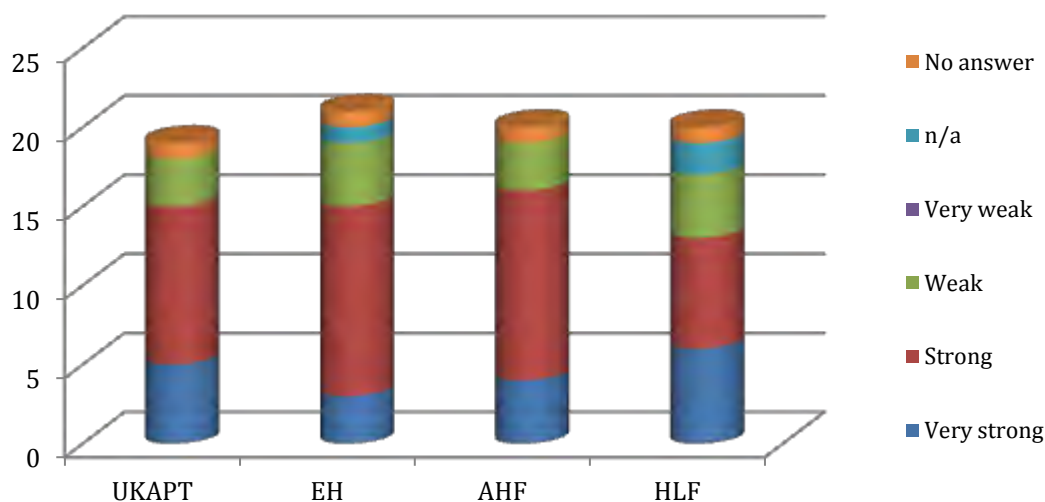


Figure 17: BPT perception of support by funders

	UKAPT	EH	AHF	HLF
<b>Not Answered</b>	1	1	1	1
<b>Not applicable</b>	0	1	0	2
<b>Very weak: no support and discouraging</b>	0	0	0	0
<b>Weak: some support and helpful at times</b>	3	4	3	4
<b>Strong: reasonably supportive and helpful</b>	10	12	12	7
<b>Very strong: mutually supportive and encouraging</b>	5	3	4	6
<b>Don't know</b>	0	0	0	0
<b>Total</b>	19	21	20	20

Table 13: BPT perception of support by funders

Encouraging closer working of BPTs with all these partners is a key aspiration to emerge from this report; each organisation can have a significant impact on the further development of these recommendations. The following section explores in more detail the relationship of BPTs with these partners, while section 3.3 principally relates to the potential role UKAPT should play (as the commissioning body for this report) in helping to stimulate further activity in the South West.

#### 3.1 Current Perceptions

When asked 'What are the areas for improvement in your Trust's relationship with each of the providers', the answers were as follows:

##### UKAPT

- *more specific emails*
- *could have a more productive relationship*
- *heritage sector is quite closed shop, old boys' network needs to widen out and become more locally relevant*

### English Heritage

- *need flexible officers who agree for amateurs to carry out work provided it is done well*
- *requirements of grants difficult to meet*
- *shortage of staff at EH*
- *very difficult to apply for funding*
- *need for understanding of Trusts needs as developers, - creative conservation*

### AHF

- *not currently possible to apply in partnership*
- *would be good if they funded partnerships, too much paperwork for small sums of money*
- *need more funds*
- *don't see a role*
- *difficulty over repayment of loan - high legal fees*
- *very difficult to apply for funding*

### HLF

- *too much education required for grants*
- *not sure HLF understand revolving Trusts*
- *applications should be less time consuming and bureaucratic*
- *so much work to apply, but process is still competitive - not helpful*
- *n/a at the moment, very early stages of current project*
- *don't see a role*
- *very difficult to apply for funding*
- *No links at present as no HLF project ongoing*

There are clearly key opportunities here for the various support bodies to work more closely together and to co-ordinate and target advice and mentoring networks.

## 3.2 Campaign Issues

BPTs identified the following areas as key campaign issues for UKAPT:

### General

- *high level lobbying role, particularly on VAT and funding generally. Economic benefits of historic environment.*
- *Better communication on what UKAPT does and wants to do. Respondent would like to contribute to this work. (Daniel Rose)*

### Historic Environment and Localism Legislation

- *heritage protection reform would help industrial buildings - single consent for monuments and listed buildings*
- *anything to strengthen planning re listed buildings.*
- *permitted uses for listed buildings. Can be a bit restrictive.*

- *unused buildings should be tackled before building new. It should be made easier for local authorities to act to stop deliberate neglect by property owners who leave their property empty for decades allowing degradation of whole neighbourhoods as has happened in Stokes Croft in Bristol which recently attracted rioting involving hundreds of police and no doubt costing millions of pounds. Some of the buildings in Stokes Croft have been empty for over 40 years and in use as an advertisement site. A planning application by the Bristol BPT, having carried out an Options Appraisal, was turned down by the planning committee a few years ago on the grounds that the building should be in retail use! The recent riots in Stokes Croft make it very topical and demonstrate the cost of this kind of neglect.*
- *campaign for 'right to buy' legislation so that communities can buy buildings that are left derelict for long periods of time.*

#### *Local authorities*

- *how local authorities look after listed buildings in their area and support them in different ways.*
- *the inclusion of a statutory responsibility for listed buildings, including advice services, such as legal and finance advice, would benefit projects like PHT and might raise their significance in the public mind.*
- *encouragement of local authorities to do more to preserve street scenes in local towns, though balanced against shortage of funds*
- *transfer of community assets, and guidance material. Preservation Trusts are different from the types of community organisations which councils prefer (sufficient community representation)*

#### *VAT*

- *VAT. Reuse of historic buildings on sustainability issue - e.g. upgrading Victorian terraces to modern standards of energy efficiency rather than demolishing.*
- *VAT on repairs, but not alterations is absurd*

#### *Skills*

- *Manpower Services Commission type initiative to provide labour for repair of buildings for unemployed people wanting work experience, skills training initiatives. Stoke's Croft - Godwin building needs a solution. Provides training for workers, buildings get repaired. This Trust has done things with direct labour. Each skilled worker can train an apprentice.*
- *ensuring that Trusts' professional advisors are of high calibre*

#### *Funding*

- *special funding criteria to encourage revolving fund projects to rescue buildings at risk*
- *funding. Harmonising guidance documents and regulations and requirements on Trusts that EH and HLF issue as conditions for applications and grants. HLF documents and systems should be the core of any amalgamation.*
- *campaign for more funding with central government inc VAT relief for repairs, good link with DCMS and Minister to stress importance of restoration of built heritage.*
- *'Viability not liability' (as being promoted by DTA). If communities are going to increasingly take on buildings a really robust analysis of viability needs to be supported.*
- *quicker simpler access to funding. Both loans and grants.*

- *bodies such as UKAPT should be talking with government about access to seed fund money, so projects can be properly appraised rapidly to allow competition against commercial companies*

#### *New models of working*

- *important for BPTs to diversify so that they can respond to needs and opportunities without being tied exclusively to building restoration. Such diversification has been important in keeping Bradford on Avon active. This may be difficult for BPTs whose constitutions are tightly drawn. It could be useful for UKAPT to develop means of helping BPTs who would like to diversify.*

#### *Profile*

- *Recognition of the achievements of Trusts, raising profile*
- *Articulate identity and strategy for BPTs at national level in a similar way to Civic Voice. Positioning BPTs within the localism agenda*
- *Raising the profile of BPT projects.*
- *Demonstrate the achievements of Trusts and campaign with government and local authorities to recognise the value of working in partnership. In particular that various organisations e.g. HLF, EH need to recognise that we're all working to the same objective - shouldn't be in conflict.*

### **3.3 UKAPT: Improving Its Support and Advice**

14 Trusts said they were aware of what UKAPT could offer, but more – 20 in total – stated they would like to receive further details.

When asked in what practical ways UKAPT could improve its service:

#### *Mentoring*

- *Identify organisations and individuals with experience in providing project organiser services for building conservation projects*
- *Mentoring between BPTs*
- *Promote mentoring*

#### *Lobbying*

- *Lobbying at national level, commenting on government consultations.*
- *Representing BPTs at high level, commenting on consultations*
- *Pressure by government and local authorities to use empty buildings, including mandatory annual surveys.*

#### *Funding*

- *Encourage EH and HLF to coordinate requirements on Trusts - conflicting ethos. EH is so bound by Treasury rules and has so little delegation of responsibility it is difficult for staff and more so for grantees. The system makes its mission of supporting heritage too expensive and much too demanding in time and unnecessary effort.*
- *More advice on funding*



### *Web:/Electronic Communication*

- *email news service rather than printed newsletter.*
- *emailed APT newsletter*
- *stay in contact with all Trustees of Trusts by email.*
- *keep in touch with all Trustees of Trusts.*
- *more advice, support and info on the web. Web forum*
- *an enhanced website that provides more advice and information.*
- *advice tailored to genre of building.*
- *updated 'How to rescue a ruin' - information on running projects. Where to get a project organiser*
- *an enhanced website that provides more advice and information*
- *helpline for users to clearly understand what sorts of support are available aimed at our types of organisation (development Trusts)*
- *would like to network with other Trusts with similar focus nationally rather than South West focus. Could be via web. Vastly different circumstances for example Bristol and Bath area is more wealthy, Devon and Cornwall very poor.*
- *lectures, disseminating more about funding/managing projects*
- *we particularly value information on new legislation, anything relevant from government departments, EH etc.*
- *disseminate new initiatives - APT News or Website. Area meetings as a means of disseminating information*
- *shared responsibility for built heritage could become more generally understood nationwide, funnelled through UKAPT Area Committees. Broker meetings with councils - potential benefits of projects. UKAPT could become an advocacy body.*
- *need new name 'Association of Preservation Trusts' is a bit old fashioned*

**Recommendation 3** (regarding support, information and advice):

The overall aim of Activity 3 in particular is to strengthen the BPT Stakeholder Map, ensuring clear lines of communication are established between the main stakeholders and individual BPTs, but also between stakeholders in relation to their treatment of and support for BPTs.

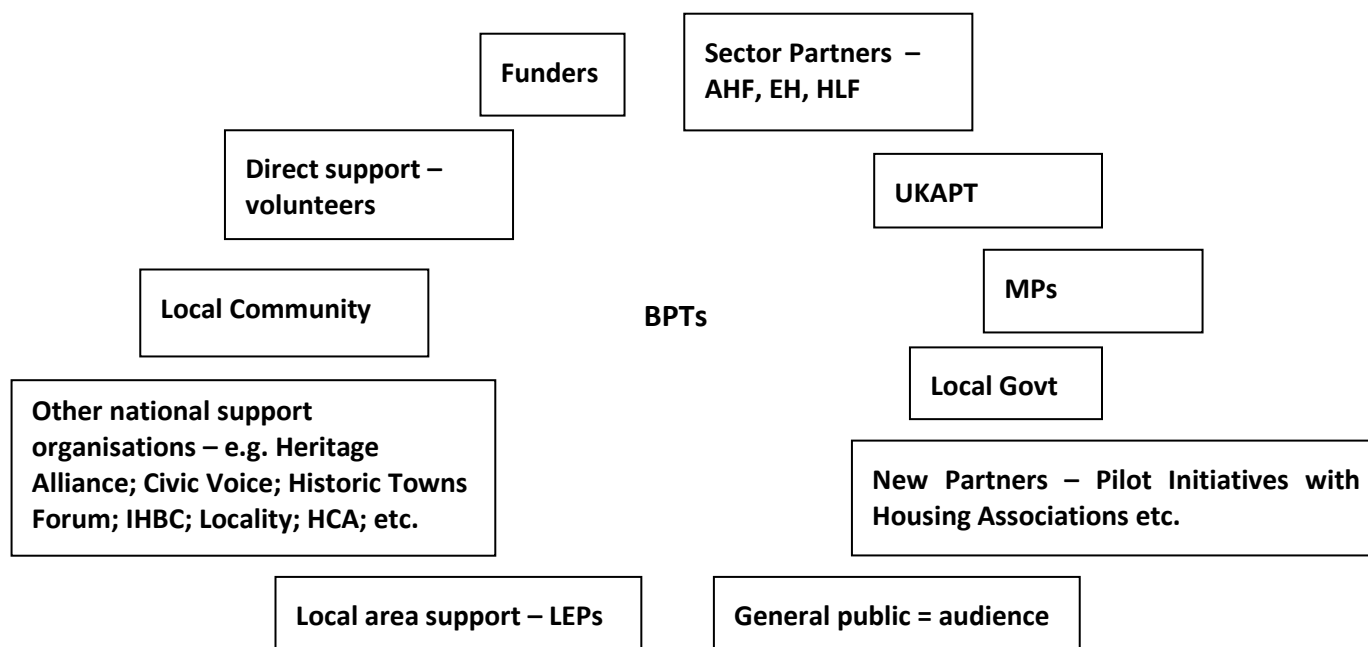


Figure 18: BPT stakeholder map

UKAPT should improve in the following ways the support network it already facilitates.

- (a) Refine the structure and content of the UKAPT website in the light of the findings of this study, to become a user-friendly communications channel for BPTs.

Selected Trusts should be invited to comment on structure, content, navigability, etc and to provide regular feedback to contribute to continuous refinement and usability. The website should provide cross-cutting opportunities to put Trusts with similar aims in touch with each other, for example:

- A. UK Wide/International/Regional: to encourage UK wide Trusts to team-up with smaller BPTs, to offer mentoring support and/or partnership working;
- B. themed: to link site specific industrial-heritage related projects;
- C. county Trusts: to link with and between county Trusts (the UKAPT study of BPT activity in the East Midlands of England also identified opportunities for county Trusts to increase their level of project activity, to support or work with individual Trusts and to re-build a strong county network);
- D. urban Trusts: to explore closer collaborative working with Civic Voice and Historic Towns Forum, links between THI schemes and links with Development Trusts;
- E. village Trusts: to explore examples such as Hartpury (which unites built and natural heritage) as a possible model for neighbourhood planning in rural areas;

- F. single Building Trusts: to encourage the transfer of skills following completion of a project; to build partnerships in specialist areas, e.g. church projects with The Churches Conservation Trust; arts-related projects with the Arts Council, etc.

It is also recommended the UKAPT website includes case-studies as examples of 'how to go about developing and delivering a successful project' and advice on:

- funding, especially 'news alert' updates on this subject;
  - mentoring;
  - new legislation;
  - new pilot initiatives (see Activity 4 in this report);
  - helpline for users;
  - project organisers;
  - profile raising; e.g. feature 'projects of the week/month'; provide marketing tips and templates for individual Trusts; provide a conduit for journalists to feature particular projects; etc.
  - a simple annual healthcheck as a regular 'prompt' for BPTs to review their capacity and ability to move forward with existing and new projects.
- (b) Encourage and facilitate increased mentoring between Trusts in the South West, noting that such support requires recognition and recompense. This would build on the valuable work already undertaken by the current Chair of SWAPT to build links with Trusts by attending their meetings and AGMs.
- (c) Strengthen working at a local area level by SWAPT:
- reviewing progress of the recommendations from this report at South West area meetings, considering relevant invitees, frequency, and content;
  - in partnership with local BPTs, brokering meetings with Councils to progress pilot initiatives;
  - maintaining and develop links to these key stakeholders, using a variety of conduits – e.g. with Local Government through IHBC, via the new AHF Regional Support Officer and to the sector in the region through membership of the South West Historic Environment Forum;
  - developing with its members a strategy for the area, in line with regional strategies already produced by APT Scotland and APT Midlands, which outline proposed service delivery options and proposals for enhancing them.

## ACTIVITY 4: STIMULATING NEW PARTNERSHIPS THROUGH PILOT INITIATIVES

The fourth activity area has been to identify a number of pilot initiatives that can be developed by the BPT movement in the South West as new approaches for building conservation projects. Involving other types of organisation as project partners can potentially access funding streams outside of those provided by the recognized heritage funding bodies and serve to extend the reach of that funding, thereby enlarging the capacity of the BPT sector. This report has also identified a need for BPTs to develop more sustainable, robust organisations to support administrative functions, training and development in addition to project delivery. The pilots are therefore designed to encourage BPTs to develop new and more robust partnerships with others in the third sector and in the public and private sectors.

A number of potential initiatives have been identified, both by trusts and LPAs. These are described below.

### 4.1 Asset Transfer

Aim: to build links with Locality and the Asset Transfer Unit via working with a specific community group to assist in the transfer of local authority heritage assets. Joint BPT/DT projects have the capacity to contribute to local authorities' economic, social and regeneration priorities. Focusing on methods of building a portfolio of successful asset transfers should ensure that local authorities would be more willing to support BPTs by sharing risk through acting as a loan guarantor; accessing further funding opportunities (e.g. European funds), by providing political and strategic support for BPT projects; and helping to obtain non local authority buildings.

Potential projects suggested by survey respondents are:

- *Warmley, South Gloucestershire*
- *Literary and Scientific Institute, Bridport*
- *Lower Lodge School, Bristol*
- *St Michaels Church, Bristol*
- *Loggans Mill, Hayle, Cornwall*
- *Swindon – various underused heritage assets*
- *Somerton Old Town Hall (however council would have to acquire)*
- *Corn Market, Bath*
- *Walcot Mortuary Chapel, Bath,*
- *Cleveland Pools, Bath*
- *Devonport Guildhall*

### 4.2 Housing Association Scheme

Aim: to develop better collaborative working with housing associations. There is much experience in the sector but this is patchy and there are opportunities to exploit more fully programmes such as the Empty Homes Initiative. Working closely with housing associations would provide a bridge between place-making and delivering social objectives.

Potential projects suggested by survey respondents are:

- *Stokes Croft, Bristol (stalled project, working with Elim Housing Association)*

- *Bennett's Fuse Works, Cornwall*
- *Upper Floor of MacLean's Warehouse, Exeter for residential use*
- *Some BaR in Gloucester could be converted to flats*
- *Newent Centre – workhouse possibly (Forest of Dean Trust)*
- *Railway Village, Swindon – 90% of it is social housing*
- *Poltimore House, Devon*
- *St Margaret's almshouses, Taunton*

#### **4.3 Area-Based Scheme (such as Townscape Heritage Initiative, THI)**

Aim: to work with a particular local authority and gain recognition for BPTs as potential partners in the delivery of regeneration objectives by participating in area-based schemes. This initiative would explore a partnership with EH/HLF and a local authority, where a BPT could build capacity by assisting a local authority to deliver an area-based scheme (such as a THI scheme), if not delivering the scheme itself.

Potential projects suggested by survey respondents are:

- *Warmley, South Gloucestershire*
- *St Michaels Trading Estate, Bridport*
- *Several towns in Cornwall*
- *Railway Village, Swindon*
- *West Street, Somerton (shopping street) linked to market square*
- *Walcot Street, Bath*
- *Warminster Conservation area including Old Town Hall possibly*

#### **4.4 Enabling Development Scheme**

Aim: to develop better private/public/third sector partnership working through development of a s.106 agreement with a private developer. BPT intervention can employ better conservation standards and deliver less intensive solutions for any heritage element of a wider development scheme, *in conjunction with* rather than in competition with private developers. The s.106 mechanism is a powerful route for BPTs to ensure they are sufficiently capitalised to have the freedom to operate in this market.

Potential projects suggested by survey respondents are:

- *Warmley, South Gloucestershire*
- *St Michaels Trading Estate, Bridport*
- *Perran Foundry, Cornwall*
- *Sutton Harbour, Exeter - selected developer for regeneration of Trust assets around canal basin*
- *Locarno building, Old Town, Swindon. Richard Jeffrey's country house*
- *Poltimore House*
- *Tone Mill, Somerset*
- *Corn Market and Cattle Market, Walcot Street, Bath*

Further information on some of the sites is provided in the Appendices.

As this Report has already demonstrated, understandably not all Trusts wish to explore these opportunities given that they have projects underway or have identified projects they intend to pursue where the new partnerships identified for the pilot initiatives would be inappropriate. Nevertheless when asked whether the Trusts would have the capacity to take on any of the initiatives, 20 of the 24 Trusts stated they would.

In the face-to-face interviews, Trusts were asked to identify which of the initiatives they would be interested in pursuing:

	Yes	No	Total
<b>Asset Transfer Scheme</b>	11	13	24
<b>Housing Association</b>	8	16	24
<b>Area-based scheme</b>	8	16	24
<b>Enabling Development Scheme</b>	11	13	24

Table 14: BPT interest in pilot initiatives

To take these projects forward, it is important to bear in mind the comments made by individual Trusts, all of which tend to echo preceding recommendations in terms of providing sufficient capacity in the shape of project organisers, training, consideration of adopting new funding models as well as addressing acquisition issues, identifying new partners such as development Trusts, and the importance of working with local government.

- *Avon: Any type of initiative on the Warmley site.*
- *Bridport: Would need more information on requirements to act as pilot. Would need a project organiser and/or given sufficient resource to handle piloting/reporting load.*
- *Bristol BPT: Kingweston house. (But not capacity to deliver) Would need injection of funding or a project organiser*
- *Bristol Visual and Environmental: Need to acquire a building. Possibly St Michael's Church. I have found it difficult to deal with local authority officers (e.g. in museums) ...this does not apply to the council's preservation Trust or 'planning' officers.*
- *Cornwall BPT: any of the pilots above, but would need paid staff*
- *Devon Historic Buildings Trust: None identified but if funding were available with project organiser then yes.*
- *Exeter Canal & Quay Trust: MacLean's Warehouse*
- *Exeter HBT: Railway heritage in Exeter say working with railway companies. Turntables etc and other buildings. Would be very interested in such an initiative and have capacity. Interpretation - Urban archaeology.*
- *Gloucester Historic Buildings: Any of the above - good mix of skills in Trust.*
- *Hartpur - Yes*

- *Llanthony Secunda Trust: Been asked to formally support some work with Woodchester Mansion Trust and see this 'sharing' of skills and expertise as a positive way forward. However Llanthony site is currently the main focus, no spare capacity.*
- *LoveBristol: For example Bristol BPT or other BPT working with Love Bristol - Love Bristol would act as the developer*
- *Mechanics: anything in Railway Village, Swindon*
- *Poltimore: Working with Shilhay community. Could create core funding, would be able to get business loan from say Charity Bank*
- *Somerset HBT: Tone Mill project (being run under Tone Mill Trust) Have had feasibility and options appraisal. English Heritage keen, Taunton Deane funding. Dragon's Den funder has provided money for mill. Cloth weaving. Needs further funding.*
- *Somerton: Old Town Hall, Somerton - if council was to acquire. Area based scheme - main shopping street*
- *Stroud Preservation Trust: Yes*
- *Totnes: community design workshops*
- *Walcot Street: Asset transfer or THI - have potential capacity. Partnership between BPT/arts cultural organisation in Walcot Street. Yes with appropriate training and guidance.*
- *THI in Warminster, but would need to investigate. Probably don't have capacity at present.*
- *Working in partnership with Development Trust or similar on acquisition of building for community benefit.*

**Recommendation 4** (regarding pilot initiatives):

It is recommended that funding is sought to enable UKAPT to encourage, support, monitor, and evaluate the projects embarking upon each pilot initiative category.

In the case of the asset transfer pilot it is recommended the work by UKAPT will be to support the application and test the guidance and best practice set out in both 'Pillars of the Community: The transfer of local authority heritage assets', English Heritage, November 2010 and the "Sustainable Heritage Toolkit", Princes Regeneration Trust, 2010. The pilot may if appropriate become a case study linked to these guidance documents, to support other trusts and community groups engaged in this area of work.

In the case of the other three pilot initiatives it is recommended that the work by UKAPT will be to develop guidance materials to ensure that the process of taking similar projects through to fruition are fully articulated and understood. It is suggested the guidance for these initiatives follows broadly the Asset Transfer toolkit by adopting a stepped approach to the project to include:

1. The 'target' building; understanding its significance and potential
2. Understanding partners' policies and strategies (i.e. in each pilot scheme: what is the core business of each partner to the project, etc.) and agreeing a joint 'mission'.
3. Defining and agreeing options for re-use
4. Addressing risks
5. Draft Partnership Agreement
6. Resolving conflicts
7. Raising finance, both to deliver the project and to ensure that the lessons learnt are transferable
8. Maintaining long-term viability

## ACTIVITY 5: DEVELOPING OTHER PROJECTS AND/OR NEW TRUSTS

### 5.1 Additional Projects

The pilot initiatives listed in Activity 4 already feature in the portfolio of current BPT projects listed in Key Issue 11. As some preliminary work has already been done towards developing those projects and relationships established with interested parties, it is sensible to focus attention and any additional resources towards completing them as soon as possible.

The research has thrown up a variety of potential further areas of work, and these are listed here as an aspirational 'shopping list' of further initiatives to explore if and when circumstances permit.

- *Bristol - 50-51 Stokes Croft*
- *South Somerset District Council - The Four Follies in Barwick Park*
- *Teignbridge District Council - The Vicarage, Dawlish*
- *Torbay Council - Barns at Torbay Boys Grammar School*
- *West Somerset Council – derelict hospital in Minehead*

The following Councils expressed an interest in being contacted for further information on ideas for possible projects:

- *Bristol City Council*
- *Mid-Devon District Council*
- *North Somerset Council*
- *Plymouth City Council*
- *West Dorset District Council*

It may be that this list encourages existing BPTs to consider taking on some of the ideas or that, in the absence of that, local interest prompts the formation of new Trusts who might be in a position to move some of these forward.

### 5.2 New Trusts

Given that there are many Buildings at risk in the area, together with a range of initiatives and projects which are currently beyond the capacity of existing Trusts, there is clearly some potential to create new Trusts. However, as this report has previously stated, existing BPTs have been very successful in rescuing Buildings at Risk and this is a strand which fits with the emerging localism agenda i.e. that the prime objective should be to support and enhance existing provision in the region, so that any new Trusts can sit under the umbrella of a strong network of multi-project Trusts that can provide support and advice to fledgling Trusts.

The evidence presented here should provide a helpful blueprint for identifying gaps in the South West as well as outlining the major constraints and opportunities in delivering BPT projects in the area. Some significant gaps in current coverage have been identified; the absence, for example, of a County Trust in Dorset. UKAPT and SWAPT could consider taking steps to investigate whether there is scope to re-establish Trusts or set up new ones where these gaps occur.



### 5.3 Other Project Ideas

As the responses below demonstrate, BPTs are thirsty to take forward a host of other ideas:

- *photo survey of a particular area (did one on the coal canal) could do a photo survey at Warmley. Avon IBT would have the capacity to deliver*
- *keen to do a survey of industrial archaeology buildings at risk.*
- *carrying out buildings at risk surveys*
- *bicycle routes.*
- *working with Shilhay Community to develop social enterprise on site*
- *providing building conservation related services to other organisations*
- *possibly take over buildings at risk information with Wiltshire. Could possibly work with Landmark or Vivat Trusts to provide holiday accommodation*
- *Restoration of historic landscapes. Reconstruction and interpretation of a Georgian historic landscape.*
- *Monitoring state of repair of buildings repaired between 20 and 30 years ago. Make sure they don't fall into disrepair again.*
- *Cornwall needs a buildings at risk register. Building preservation Trust could do this if given a grant.*
- *working with parochial church council of repair of listed wall in Hempstead*
- *BPTs should be allowed to initiate and carry out their own CPOs. BPTs could work more with entrepreneurs and developers to produce good outcomes.*
- *Working in partnership with development Trusts. In places where there are historic or noteworthy buildings that conservationists would like to safeguard there are also often development Trusts which have a social remit but working on business lines - a natural fit.*
- *Potential for local BPTs to link up and create partnership with national heritage organisations more. BPTs bring the local angle, national heritage organisations can bring skills, experience and resources. National Trust has a 'going local' strategy. National Trust may start looking at different types of acquisitions - may be more in urban areas. Could work in partnership with the National Trust to create a solution.*
- *Absence of cultural activities in the given list of initiatives - the Trust is keen to ensure that business activity has a cultural/arts element to it, and that this supports links with wider local community. Could talk to local authority to support Shilhay community at Poltimore rather than where they are, develop that charity in Poltimore location. Set up a social enterprise. BPT repairing a building in association with voluntary labour with social benefits and heritage skills training. Also Exeter College building training, apprentices. Partnership with a building firm. Would have capacity to deliver- would create core funding for Poltimore, could go for business loan to Charity Bank. Want to become more commercial - thinking about a catering facility. Homeless people with basic catering qualifications and interests would come out and work and get qualifications - thinking of Portakabins. Catering business. Ultimately fill the building with small scale business.*
- *New ways of working are being piloted by lots of other organisations in town. Hospital - community owned initiatives, also community owned farms. One potential area - major potential in valleys for electricity generation, would be good to be community owned by community Trust, which would be a revolving fund. Could Stroud Preservation Trust champion this in partnership with others? - renovation of the falls of water, making heritage contemporary and useful.*
- *Community design workshops. Ongoing need to educate the public.*
- *Partnership between preservation Trust and arts cultural organisation - Walcot Street Corn Market, Walcot Mortuary Chapel*
- *Possibly a project that needs to be brought into some sort of community use, could be employment based or socially based, working more closely with development Trusts. Could be potential for acquiring a building from the private sector as a partnership between development Trust and BPT where a heritage element is involved. Something similar to glove factory in Holt, near Bradford on Avon.*

The list includes interesting ideas although, in the current difficult funding climate, it is recommended that BPTs focus resources on projects most likely to succeed. An ongoing role of the Project Board could be to assist BPTs in identifying priority projects. The following is offered as a checklist of criteria to consider in the initial assessment of a potential project.

**Proposed selection criteria for projects involving  
Building Preservation Trusts (BPTs) and other partner organisations**

1. Criteria related to the BPT and partner organisation(s):
  - (a) Identification of an appropriate BPT and partner organisation(s) for the proposed project
  - (b) Willingness of BPT and partner organisation(s) to take on the proposed project
  - (c) Capacity of BPT and partner organisation(s) to take on the proposed project
2. Criteria related to the building(s) proposed for the project:
  - (a) Status of the building(s) (BaR entries having priority)
  - (b) Condition of the building(s) and degree of urgency (EH's top 10 BaR being priority cases)
  - (c) Clarity of ownership
  - (d) Attitude of the owner towards supporting the project and agreeing the transfer of ownership at an appropriate stage of the project
3. Criteria related to the proposed new use:
  - (a) Viability of proposed new use
  - (b) Certainty of securing an end user
  - (c) Compatibility of the proposed end use with objects of the chosen partner(s)
4. Criteria related to funding sources:
  - (a) Viable mix of partnership funding established
  - (b) Project timescale match with that of funding programmes
  - (c) Expressions of support provided by key funders
  - (d) Availability of sufficient seedcorn funding

Figure 19: Proposed selection criteria for BPT projects

**Recommendation 5** (regarding other projects and/or new Trusts):

Resources should be focused on completing existing projects. Where high priority BaR are not on the list of current projects UKAPT, via SWAPT, should encourage existing BPTs to take on those projects; where such buildings are located in geographical areas of the South West not currently covered, existing BPTs should be encouraged to extend their geographical area or alternatively the prospect should be explored of establishing new Trusts in those areas.

## Next Steps

The underlying theme of this report is tackling Heritage at Risk. This is a fundamental priority for the sector. It is reflected in English Heritage's Corporate Strategy 2011-2015 and is a key priority in the National Heritage Protection Plan (NHPP), a sector-wide plan conceived by English Heritage as a framework for prioritising limited resources across the sector and wider communities to protect the historic environment. Government has also recently stated that tackling long-term Buildings at Risk should be a particular priority<sup>7</sup>. Implementing this report's recommendations will help deliver against this shared objective which in turn supports sustainable development, distinctiveness of place and economic growth.

This report is scheduled to be launched on July 4<sup>th</sup> 2012. It should then be disseminated in a focused approach aimed at raising the profile of the works of BPTs in the South West and to invite support for the recommended actions from BPTs, partner organisations, and stakeholders.

There is a need for a "South West area implementation group" of key stakeholders to encourage and monitor actions in response to the findings and recommendations of this study. The Project Board established to oversee the production of this report would seem to provide the ideal nucleus for that strategic group and it is to be hoped that English Heritage and UKAPT, along with other stakeholders who may be invited and willing to partake, will recognise the potential benefits to be gained and agree to commit the necessary resources for that to happen.

The first task of the implementation group will be to review the recommendations of this Report, agree a prioritisation that takes into account the degree of urgency and ability to muster the necessary resources, then map out an action plan and a series of milestones to be achieved. A dissemination strategy can then be devised that is focused on the action plan.

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<sup>7</sup> See Presentation by John Penrose MP, Tourism and Heritage Minister, at Apsley House, London, 22 May 2012 ([www.english-heritage.org.uk/about/multimedia-library/corporate-plan/](http://www.english-heritage.org.uk/about/multimedia-library/corporate-plan/))

## **Appendices**

**Appendix A: Trust data**

**Appendix B: Dates of Formation**

**Appendix C: Classification of Trusts**

**Appendix D: Completed Projects**

**Appendix E: History of the BPT Movement in the South West**

**Appendix F: Funding: Heritage Lottery Fund**

**Appendix G: Funding: English Heritage**

**Appendix H: Funding: Architectural Heritage Fund**

**Appendix I: Healthcheck Questionnaire**

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