

PROJECT BUSINESS CASE

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EXECUTIVE SUMMARY

Bristol City Council acquired Stoke Park Estate in January 2012 under a section 106 agreement with South Gloucestershire Council. The decision was taken to secure the long-term future of site for the benefit of the people of Bristol and South Gloucestershire. The agreement included a dowry of £1.5m with a requirement that £300k would be used to restore an historic wall on the periphery of the estate.

The key challenge facing Stoke Park Estate is how to attract the investment required to remove the site from Historic England’s ‘at Risk Register’ and provide the visitor experience commensurate with other heritage destination parks within Bristol such as Ashton Court.

It is proposed that the Council applies for funding from the Heritage Lottery Fund for a project with an estimated overall value of £4m (£3.2 grant from HLF). It is envisaged that the project would help meet strategic objectives for the Council in particular the regeneration of the Lockleaze area and develop Stoke Park as a citywide destination site.

A number of organisations and stakeholders have expressed an interest in supporting a major restoration plan for Stoke Park Estate.

The immediate next step is to quantify the capital and revenue costs and income generation potential of the preferred options set out in the draft Stoke Park Conservation Management Plan which was completed in April 2016. This process will require public consultation ahead of the council’s decision to submit a stage I development grant bid to HLF.

1. STRATEGIC FIT

1.1 Background to project:

Stoke Park Site Summary

Stoke Park Estate is a 108 hectares (267 acres) grade II registered historic parkland that lies on the north east boundary of Bristol, some two miles from the city centre. Stoke Park estate is owned by Bristol City Council, with part of the estate within the South Gloucestershire Council boundary. The estate is clearly visible from the M32 motorway, encompassing the sweeping landscape adjacent to the distinct yellow Dower house, which itself is privately owned.

Stoke Park Estate incorporates the Registered Historic Stoke Park which is the best surviving example anywhere of an 18th Century landscape by Thomas Wright, known as the *Wizard of Durham*, incorporating listed structures and memorials and the Second World War anti-aircraft battery Scheduled Ancient Monument, locally known as Purdown Percy.

Stoke Park is an important green wedge that provides a physical link for city dwellers to the wide countryside. Its close proximity to the centre of Bristol and its topographical prominence, make

it a significant and an important recreational resource / opportunity to the City, local communities and urban areas of South Gloucestershire. The estate is rich in wildlife and encompasses a wealth of historic features.

Although largely surrounded by urban development at Lockleaze, Stapleton and newer development to the north including the University of the West of England campus, the estate is widely visible over large areas of north-east Bristol and beyond. The woodland on the crest of the ridge forms a backdrop to the Dower house and park and creates a rural setting.

Bristol City Council decided to acquire Stoke Park in 2009 (Cabinet 2nd April 2009). The site was eventually transferred from the Development Consortium (Barratt Homes and Taylor Wimpy) in January 2012 via a Section 106 agreement to include a £1.5 million dowry (£1.2M + £300k specifically earmarked for the repair of the historic St. John's wall). BCC's cabinet accepted the following arguments:

- 'Both the City Council and South Gloucestershire Council are concerned that Greenbelt [The Greenbelt Group are a national green space management business] may not provide the level of resourcing, focus and local knowledge that is required by both councils and local residents, in an increasingly densely populated part of the city's northern fringe;
- ...City Council ownership will provide a stronger link with the wider Parks and Green Space Strategy and investment / management programmes in the city - and to introduce innovation in the form of sustainable local food production aimed at local schools and wider markets which will support wider healthy eating and public health agendas.
- It is estimated that in the early years costs can largely be met from the endowment from the developers, but in the longer term the net cost of maintenance of the park could be in the region of £80-£100k pa.

Current, day-to-day site management is funded from the dowry and provided in-house by the Eastern and Central Grounds Maintenance Team with assistance from Blaise Castle Estate ranger Team. Maintenance activity is detailed in the operational plan for the site and includes mowing of open grassland, maintenance of paths and entrances, emptying waste bins and a limited site presence via a shared Ranger service. Recent capital investment has included restoration of Sir John's Wall (£300k), some woodland path restoration and works to allow limited re-introduction of cattle grazing in summer 2016.

The current value of the dowry is around £1.2M. No significant draw-downs (aside from the earmarked fund to repair St John's wall, have yet been made from the Dowry (costs have been met from other funds). However, from 2016/17 the following draw-downs will be made from the Dowry: c. £45k / year operating costs, £30k / one-off devolved to the Lockleaze and Horfield Neighbourhood Partnership for projects within Stoke Park (community consultation on this sum began in July 2016) and c. £15k for installing grazing infrastructure for land known as the Priory Field to enable the Brandon Trust to graze the site. The forecast value of the dowry by 4th April 2017 is c. £1.12M.

In 2016 A Conservation Management Plan was produced for Stoke Park. The plan:

- Updates the 1991 *Stoke Park Masterplan*
- Guides the overall care, conservation and restoration of the park and features;
- Supports bids for external grant aid;
- Informs the adjacent development plan;
- Informs the ongoing day-to-day management of the park, and
- Informs the production of a Business Plan for Stoke Park Estate.

1.2 Business need for project (inc. why this project is needed now; what is the current state?):

The challenges facing Stoke Park include:

- The M32 motorway which has subdivided the park creating visual intrusion, noise, air pollution and ecological barriers;
- Absence of traditional livestock grazing resulting in uncontrolled scrub invasion and non-economic maintenance system,
- Low biodiversity grassland and decay of historic field boundaries;
- Loss of nearly all the parkland trees;
- Archaeological and historic structures in poor condition and at risk of further decay;
- Lack of woodland management;
- Security issues and anti-social behaviour;
- No system of all-weather path circuits and poor visitor access due to lack of a car park,
- No visitor facilities, few formal events, limited interpretation and
- Lack of income-generating facilities affecting financial viability of the Park.

In consequence, since 2009 both the Registered Park and the Scheduled Ancient Monument have been placed on Historic England's At Risk Register.

The Stoke Park Conservation Management Plan sets out actions to improve the estate, removing it from the 'at risk register' at minimum and following further investment develop Stoke Park into a citywide destination site comparable to Ashton Court Estate or Blaise Castle Estate.

The arguments to prioritise a restoration programme for Stoke Park are:

1. The heritage features within the estate will continue to decline from neglect and vandalism. Several features are now in a critical state, including the Scheduled Monument Anti-Aircraft battery where further delay will result in the permanent loss of some historic features and substantially add to the complexity and cost of restoration;

The current visitor experience is generally poor (decayed infrastructure, lack of information / signage), this limits visitor numbers and experience. There is a clear expectation from the local community that the council will prioritise a restoration plan for Stoke Park. In 2009, cabinet was informed that the local community were 'very enthusiastic that the city council should take over the estate, as a means to ...'secure the long term access and public interest in the site'. The community expectation for investment in Stoke Park is reflected in aspirations of draft Neighbourhood plan and through social media, local forums and groups.

2. Lockleaze is a current focus for economic regeneration. An in-tandem restoration of Stoke Park would secure access for this community to a high quality recreational resource;
3. In the absence of an investment plan, the Stoke Park Dowry will continue to be eroded diminishing the opportunity for it to be used as match-funding for a significant grant from the likes of the Heritage Lottery Fund;
4. Whilst the 'at risk' status of Stoke Park attracts no statutory penalty, there remains an expectation that the council will provide leadership to restore the estate for the benefit of the people of Bristol.

5. The Bristol Heritage Framework and embodied heritage scoring methodology identifies Stoke Park as a priority site for restoration;
6. The absence of a clear restoration commitment is holding back progress of investment opportunities such as Countryside Stewardship which would attract capital and revenue income that would form key match funding to any bigger bid and necessarily would require consultation and commitment from the council to invest in the park (particularly the introduction of cattle grazing).

The restoration of Stoke Park would dramatically improve the visitor experience to the park and support community engagement. Restoration actions would include:

- i. Protect the archaeology including the World War II anti-aircraft gun battery;
- ii. Maintain and repair historic structures, including follies, walls and ponds;
- iii. Replant parkland trees;
- iv. Reintroduce grazing (absent for over 20 years);
- v. Restore historic woodlands;
- vi. Restore Thomas Wright's woodland walks, follies and benches;
- vii. Restore the historic gravel paths and rides to provide 'all access' routes;
- viii. Provide a Stoke Park visitor focal point and associated facilities, including car park, food outlet, information point and access to the wider estate [option for joint venture development involving Groundwork Trust and Learning Partnership West – associated with the Lockleaze Youth and Play Space];
- ix. Support community involvement including volunteering, open days, school visits and guiding the management and maintenance of the park.

Major investment of around £4m is required to deliver all aspects of the restoration plan outlined above (items i-ix inc.). Historic England have indicated that to remove the estate from the 'at risk register' only would require investment of around £3.5m (items i-vii inclusive). Securing investment to deliver items viii- ix will be necessary to provide a financially secure long term future for the estate based on a plan to grow visitor numbers and exploit associated commercial opportunities. To take all ideas forward, a detailed analysis of options and costs should be undertaken, including quantification of revenue liabilities and the potential for new sources of income to offset such costs.

The most appropriate source of funding to progress any significant restoration of Stoke Park is the Heritage Lottery Fund 'Parks for People' fund combined with The Big Lottery Fund. Together these could provide up to 80% of the costs of the project (i.e. £3.2m of the estimated £4m project cost) this would include costs towards the maintenance of the site. The Stoke Park dowry could provide up to £800k match funding that is likely to be required for this level of investment. Additional funding options include Natural England's Countryside Stewardship scheme, Section 106, partner funding and in-kind support from partners and volunteers. The aim would be to minimise draw on the dowry.

An expression of interest has been submitted to Heritage Lottery Fund exploring funding options and a site meeting was held with the HLF's south west representative on the 7th July 2016. The meeting was positive and it was confirmed that BCC has the potential to develop an application appropriate to the Parks for People scheme funded by both the Heritage Lottery Fund and the Big Lottery Fund, the following more detailed feedback has been received:

- HLF are very interested in how the project can support biodiversity targets;
- Demonstrate local need and partnership support for the project, including via

- consultation;
- Provide a resource plan, including match funding commitment, to demonstrate how the development phase of the project will be taken forward;
 - The project is a clear opportunity to remove Stoke Park from Historic England's risk register;
 - Funding to support buildings / associated car parks can be supported where there is clear business need;
 - It is expected that resources to maintain the estate will need to increase to sustain the (HLF) investment;
 - BCC has the opportunity to highlight a successful track record in restoring other heritage sites in Bristol using HLF funding (e.g. Ashton Court Estate and Blaise Castle Estate).
 - Quantify the strategic context to argue Stoke Park as a priority site for investment;
 - Having a Conservation Management Plan is an advantage, but BCC should justify a relevant restoration plan for the estate;
 - The stage I HLF application should be submitted with ideas sufficiently worked up that would not cause 'significant change' as detailed plans are worked up during the Stage I development phase (ahead of a stage II bid which would seek funds to restore the estate);
 - There is expectation that Stoke Park should obtain Green Flag status (the benchmark national standard for parks and green spaces in the UK)
 - The key challenge beyond any successful capital investment phase is to ensure a financially sustainable and long term solution for Stoke Park Estate, one that can provide sufficient income to provide and maintain features and services of benefit.

1.3 Project objectives

The project objectives have been summarised in the table below. These objectives are also proposed as the criteria for undertaking the non-financial assessment in section 2.

Project Objectives / Criteria	Project options
Strategic fit and business needs	To what extent an option meets relevant corporate initiatives and priorities
Potential for generating income	<p>To what extent a project option has the potential to generating income</p> <p>This should include income generation through concessions, new businesses events, agri-environment grants, revenue from Heritage Lottery funding e.g. funding for a ranger/site warden post, corporate/public sponsorship/donations, local taxation through levy's on businesses and residential properties, cafes, shops, charging for car parks,</p> <p>HLF funding would provide revenue for first 5 years including funding for full time ranger</p> <p>Further analysis, is required to establish whether investment of around £4m into Stoke Park which will realise tangible benefits that can create the conditions to generate income which, at minimum, will meet ongoing operating costs. Similarly if a lower level of investment of around £3.5m only</p>

	<p>was possible, which should see the site removed from the 'at risk register' what income generation would be possible and is there an argument for a higher capital investment to address long term sustainable funding.</p>
<p>Potential achievability</p>	<p>The key factors which help the project to succeed are:</p> <ul style="list-style-type: none"> • £1.12M Dowry which would enable the 20% Heritage Lottery match funding which is likely to be required. • The range of partners and their associated expertise and resources e.g the provision of cattle by the Brandon trust to graze the entire site. • The political imperative to restore and manage stoke park for the benefit of the local community and wider city
<p>Partners capacity and capability</p>	<p>The following organisations have been identified with potential to partner / act as contractor in delivering a restoration plan for Stoke Park and / or a role in supporting ongoing maintenance.</p> <ul style="list-style-type: none"> • Avon Gardens Trust • Avon Wildlife Trust • Brandon Trust • Forest of Avon Trust • Groundwork Trust South • Historic England • Learning Partnership West • Natural England • National Trust • Stoke Park Action / Delivery group and NP • University of the West of England
<p>Potential affordability</p>	<p>Work is required to quantify the capital investment programme and revenue implications of a Stoke Park restoration, including options to get the highest benefit for the lowest cost / risk exposure. This work is required to inform a stage I bid to HLF (target application 28th February 2017). Given the specialist nature of this work, it is recommended that consultants are appointed to prepare our case including preparation of the HLF stage I application. As scoping conversations have been held with the consultants involved in preparing the Conservation Management Plan.</p> <p>The HLF bid will require at least 20% match funding, as such assuming a £4m capital programme, HLF would contribute £3.2m. The £800k cash match funding could collectively come from:</p> <ul style="list-style-type: none"> • Stoke Park dowry, current value £1.12m; • Countryside Stewardship Scheme grant; worth an estimate £150k over 5-years made up of capital and revenue funding; • Basic Payment Scheme, worth c. £14k per year for the life of the project or c. £70k over 5-years for comparison (this would also contribute the long-term running costs), • Income from events and catering concessions. Potential income from a future events programme new catering facilities is yet to be calculated subject to business pan analysis; • Charge for car park to be constructed –anticipated c. £10k per year but unlikely to be charged in the initial years until visitor numbers begin to increase, and

	<ul style="list-style-type: none"> s.106 –currently small sums – work required to identify available funds.
Contribution to economic regeneration	To what extent will the project options assist is the economic regeneration of areas surrounding Stoke Park and to the wider Bristol economy
Removal from the Historic England at risk register	Stoke Park is currently on the Historic England at Risk Register as result of declining condition of anti-aircraft battery Scheduled Monument , 18 th Century listed monuments historic landscape, This criteria aims to establish to what extent project options will remove Stoke park from the risk register
Community impact	What will be the benefits of the project options to the Stoke Park local community

1.4 Project Scope

In scope:

The estate parkland and woodland within Stoke Park Estate.

Out of scope:

The Dower House (as it is in private ownership), Simms Hill and Duchess Gate, which is within the registered landscape but outside BCC ownership (Duchess Gate is owned by the NHS)

1.5 Key risks with this project (full risk log attached):

Outline what elements of the restoration are being risk analysed – plan process, bcc commitment, community support, capital and revenue sustainability, marketing stoke park as a destination visitor site.

Risk Log ID	Risk Description	Countermeasure	Priority (Post mitigation)	Financial Impact? (Y/N)
	Project does not meet deadlines	Appoint competent project manager and consultant including contract management set up steering group with appropriate expertise to oversee all stages of project		Y
	Ensuring Community Support	A city wide consultation exercise will be carried out to judge public reaction to the change elements identified in the Conservation Management Plan		Indirect -
	Marketing Stoke Park as destination site. Stoke Park does not attract sufficient number of visitors from across the city, 'sufficient' to be defined as part of the HLF stage I bid development process.	Take into account public consultation views on Stoke Park being destination site. Ensure key visitor interest features promoted sufficiently.		N

Risk Log ID	Risk Description	Countermeasure	Priority (Post mitigation)	Financial Impact? (Y/N)
	Capital Sustainability Insufficient HLF match funding to deliver project	Revise project to fit available funding		Y
	Revenue Sustainability Insufficient revenue generated to support the site	Revise maintenance of site to fit revenue budget		Y

1.6 Key stakeholders:

Exploratory discussions have been held with the following organisations about their possible involvement in helping to deliver the HLF project, with findings summarised below:

- Avon Gardens Trust
- Avon Wildlife Trust
- Brandon Trust
- Forest of Avon Trust
- Groundwork Trust South
- Historic England
- Learning Partnership West
- Natural England
- National Trust
- Stoke Park Action / Delivery group and NP
- University of the West of England

Further, there is an intention to approach the NHS Priory mental health hospital, which borders the site, with a view to exploration of mental health connections and relevance to The Brandon Trust's focus on similar issues under their 'Care Farming' programme (see below). Further engagement is required with South Gloucestershire Council, to determine their interest in being a partner.

Avon Gardens Trust

Considered a potential partner, but formal contact is due to take place. Their role may include:

- Encouraging a greater understanding of the historic interest of Stoke Park through research and visits;
- Encouraging greater links with schools ;
- Promote links with local community groups by offering grants, and

Avon Wildlife Trust (AWT)

AWT consider that they may be able to support the HLF application and future delivery;

1. AWT is supportive of wildlife conservation management within the BCC parks and estates and is able to input specialist advice if required, including experience of an 'invisible fence' approach to contain grazing herds of animals.

2. AWT's 'My Wild City' programme currently works across Bristol to promote and strengthen wildlife corridors and engage communities in taking action for wildlife. BCC and AWT are due to submit a joint partnership bid to HLF in August to expand this programme into parks and green space within the city, with a focus on volunteer support. Whilst, Stoke Park is not identified as a site, for reasons of scale, there are opportunities to apply the learning and practice from this project
3. AWT's 'Natural Estates' project is a current 5 year programme to engage young people (11-24 year olds) in taking positive environmental action where they live. There are opportunities to extend this training programme to include Stoke Park Estate Stoke Park, reflecting Lockleaze as a target area within the project.

Brandon Trust own and rent land in the immediate area which includes an established cattle herd and already grazing part of the Stoke Park Estate under annual grazing licence. An option is for Brandon Trust to be a significant partner in extending cattle grazing over a large area of Stoke Park as has been identified in the Conservation Management Plan. Brandon Trust has an expressed an interest in this option. Further, Brandon Trust as an affiliated Care Farming provider which use farming practices for therapeutic use, particularly for mental health benefit <http://www.carefarminguk.org/>. There are further options to explore their role further in providing such therapeutic care services including links with the NHS Priory mental health, whose boundary is contiguous with the estate.

Forest of Avon Trust

1. The Forest of Avon Trust is interested in playing an active role in the woodland management and planting proposals set out in the Stoke Park Conservation Management plan as this fits with their charitable objects, expertise and knowledge of the woodlands and trees on site. They have a Community Trees & Woodlands Officer who could expand their role to work with local communities and any site ranger, as well as their existing volunteer network to provide regular volunteer days on site, undertaking practical and sympathetic woodland management work and also providing accredited skills training to establish locally- based volunteer leaders; over time, these staff would take a greater lead, enabling more volunteer activity to take place.
2. Linked to the above, the Forest of Avon Trust is also interested in the educational/ experiential aspects of the proposal set out in CMP as they have staff (Associates) with considerable expertise in Forest School training, INSET days and running activities for adults with learning difficulties, people with mental health needs and families living with dementia. Their interest would be in the design and creation of a small number of activity spaces in suitable locations within Stoke Park woodlands and running an educational outreach programme which trains and initially supports local schools to use these spaces and on an ongoing basis. They would also be very interested in running a programme of activities each year in the woodland for people in the local area who live with depression, dementia or who have learning difficulties (this could also include activities for the wider public). They would need to be funded to deliver this programme but more general activities could over time, be charged for, offsetting some costs; with the development of interest in Social Prescribing, some of the other costs could be offset over time.

Groundwork Trust South (GW), provide and run the Lockleaze Youth and Play Space (also known locally as the 'Vench'), which border Stoke Park Estate. GW consider:

1. Their adventure playground could provide an attraction to visitors of Stoke Park Estate;

2. Their buildings could provide learning facility for schools and other groups visiting Stoke Park Estate, and
3. They have youth engagement role as LPW are using their site.

Our view is that the 'Vench offers an opportunity to partner with GW and develop this facility into a significant attractor in bringing people to Stoke Park Estate. This would require development including 'opening up' the 'Vench to the estate (in that currently it is fenced off with no direct access into the estate). It is anticipated that a small car park would be required (space is available and would be outside the formal registered landscape boundary). Any development of catering facilities within the 'Vench site would benefit visitors but in this model would not provide direct income to the Estate.

Historic England is the government's advisor on Nationally Important Registered Parks and Gardens and Scheduled ancient monuments. They have provided an 80% grant for production of Stoke Park CMP worth £27,600 and provided advice as members of steering group throughout the development of the draft plan. They have indicated that would be willing to sit on project board to oversee the delivery of the CMP objectives.

Learning Partnership West

Engaging young people in the future of stoke park is essential not just to reduce anti-social behaviour, but as a means to improve opportunities for young people. Through engagement with Learning Partnership West opportunities for young people can include better recreational provision, education and vocational based training.

Natural England is the statutory Government advisor on Nature Conservation and is responsible for administrating EU supported agri-environment grants. They have been closely involved in helping to develop projects to restore the historic landscape and ecology of the Stoke Park, including:

- Providing financial support to undertake a cattle grazing feasibility study for Stoke Park with aim of managing the landscape and wildlife value of the grassland.
- Encouraging the Council to submit agi-environment grant applications to restore the historic landscape and ecology

National Trust

Exploring new strategic direction from the NT to resource outreach programmes in publicly accessible green space, via their 'civic awakening' programme. Option explored for NT to share intellectual property to assist BCC in submitting a successful HLF bid and developing a sustainable business plan. Negotiations are ongoing.

Stoke Park Delivery Group and NP

Stoke Park Delivery Group has a voting membership of up to twelve Resident Representatives from Lockleaze and the surrounding areas plus Councillor representative for Lockleaze, Frome Vale, Eastville, South Purdown and South Gloucestershire. The purpose of the group is to share information, support the delivery of the management plan, recommends projects to be funded by Neighbourhood Partnership, identify and raise funds for the benefit the park and to increase community involvement. The Group and been consulted during development of draft Conservation Management Plan and are supportive of the range of objectives and the proposal to apply for Heritage Lottery Fund grant to implement the plan.

The University of West England would contribute expertise in developing IT based educational and interpretation facilities as well helping to develop youth engagement. Their capacity and capability in this field has already been demonstrated.

2. OPTIONS APPRAISAL

2.1 List of options considered:

- Do nothing i.e. maintain the same low input ad hoc approach
- Do enough to remove from At Risk Register
- 'Full' restoration
- Seek to dispose of the site to a third party transferring responsibilities for restoration and maintenance

Option	Description
Option 1 Do Nothing	To continue to manage Stoke Park by providing a basic grounds maintenance (including flailing / hay cutting of the remaining open grassland/edges, emptying of waste bins, cutting of slopes and entrances), clearance and maintenance of paths and anti-aircraft battery and limited ranger presence (1 day per week) to patrol the site and deal with anti-social behaviour and reactive management e.g. fallen trees. No restoration of historic features with implied ongoing deterioration of such features
Option 2 Do enough to remove Stoke Park from the 'at risk register' register	Remove the Historic Landscape registered Park and Garden and associated listed and non- listed monuments and WWII aircraft battery from the Historic England at Risk Register. The actions identified in the Stoke Park CMP necessary to achieve this include fencing and partially burying and stabilising WWII anti-aircraft battery the features of interest restoring the landscape by reintroducing grazing and carrying out woodland management under Countryside Stewardship agreement; maintain and repair historic structures (monuments, follies, walls and ponds); replant parkland trees; thin out scrub, restoring Thomas Wright's woodland walks, follies and benches; restore the historic gravel paths and rides to allow people of all abilities to enjoy the Park, all year round access. provision of interpretation facilities using virtual and on site signage; creating all ability and year round access, employment of full-time ranger with aim of reducing anti-social behaviour, increasing awareness of the site through walks and talks and facilitating the management of the park

Option 3 'Full' Restoration	Full restoration will include option 2 creation of new visitor facilities and car park; community involvement including volunteering, open days, school visits, guiding the management of the park.

2.2 Summary of option analysis:

PROJECT BUSINESS CASE



Options identified in section 2.1 are to be assessed financially and non-financially in order to identify the preferred option.

Non-Financial Assessment

<u>Criteria/Objective</u>	<u>Option 1 Do nothing</u>	<u>Option2 - Do enough to remove SP from risk register</u>	<u>Option 3-Option 2 plus 'Improve visitor experience, community involvement, learning opportunities'</u>
Strategic fit and business needs	Does not meet and / or compliment objectives for the Neighbourhood plan, core strategy, major projects for Lockleaze, access audit and Parks and Green Space Strategy (2008)	<p>Partially meets and/or compliments objectives the Neighbourhood plan, core strategy, major projects for Lockleaze, access audit and Parks and Green Space Strategy (2008) for the following reasons:</p> <p>Bristol City Council Corporate Plan 2014-2017 'Bristol City Council will work to address inequalities of health, wealth and opportunity in the city, supporting every citizen to reach their potential by creating successful places in which to live, work and play.'</p> <p>Arguably Stoke Park is not currently a 'successful place' in that it is suffering from chronic neglect and decay and Lockleaze is identified as area of deprivation in Bristol. Stoke Park has significant potential to become a high quality recreational resource to immediate communities and a citywide audience.</p> <p>Horfield and Lockleaze Neighbourhood Partnership Plan 2015-17</p> <p>Taken from the Horfield and Lockleaze Neighbourhood Plan, the following priorities are directly relevant to Stoke Park:</p> <ul style="list-style-type: none"> • Give priority to Improve Stoke Park, including supporting the delivery of the Stoke Park 	<p>Fully meets and/or compliments objectives for Neighbourhood plan, core strategy, major projects for Lockleaze, access audit and Parks and Green Space Strategy (2008) in addition to Option 2 the provision of Visitor centre/cafe and Car Park will add to the quality of Stoke Park as recreational resource by providing facilities for both local people as well as attracting a city wide audience.</p> <p>Community involvement including creating self-sustaining permanent volunteering will help managing the site, open days will help increase understanding and enjoyment of the Park, creating opportunities for local schools using the site to meet national curriculum learning requirements ,</p> <p>–</p>

		<p>Management Plan;</p> <ul style="list-style-type: none"> • Tackle anti-social behaviour in Stoke Park by engaging young people; • Ensure the area has good quality parks and is attractive and well maintained; • Make the Neighbourhood Partnership a safe place to live and work; • Provide an area which is planned, designed and developed with due regard to the wishes of local residents; • Support activities for all sections of the community; • Develop a strong local economy; • Develop community facilities in areas that need it, and support existing community facilities, and • Increase community cohesion and celebrate diversity. <p>Bristol City Council Core Strategy</p> <p>Policy BCS22 'Development proposals will safeguard or enhance heritage assets and the character and setting of areas of acknowledged importance' including:</p> <ul style="list-style-type: none"> • Scheduled ancient monuments; • Historic buildings both nationally and locally listed; • Historic parks and gardens both nationally and locally listed; • Conservation areas; • Archaeological remains. <p>The restoration of Stoke Park would be a significant contribution to meet the aims of the Core (development) Strategy.</p> <p>Major projects</p> <p>In translating the core strategy and applying actions within the corporate plan, Major Projects plan for the Lockleaze area is 'to raise the economic and social status of the area by creating new high quality homes e.g. development of Romney House site, providing new student accommodation for UWE, creating new facilities</p>	
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		<p>such new supermarket (at the old police station and Cameron centre) and library as well as providing a proportion of affordable homes’.</p> <p>The delivery of the actions set out in the draft Stoke Park Conservation Management Plan is commensurate with the development plans aims by enhancing visitor experience at Stoke Park.</p> <p>Parks and Green Space Strategy</p> <p>In April 2009 Bristol City Council Cabinet agreed to purchase Stoke Park, the report referenced the ‘opportunity to deliver against a number of policies in the adopted Parks and Green Space Strategy, including the management of a new and more accessible destination park for local and wider city centre residents, and to develop innovative programmes for sustainable food production;</p> <p>The relevant policies in the Parks and Green Space Strategy (2008), include:</p> <ol style="list-style-type: none"> 1. Raise the quality of parks and green spaces. 2. Encourage greater use and enjoyment of Bristol's parks and green spaces by all sectors of the community. 3. Rectify shortage in particular types of green space across the city; 4. Provide a clear basis for the beneficial investment in green spaces 5. Encourage active and healthy life-styles 6. Encourage community participation in the improvement and management of green spaces. 	
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<p>Potential for income generation</p>	<p>Offers no added benefits</p>	<p>The restoration of Stoke Park is expected to make it more attractive place for visitors thereby increasing opportunity for income generation through concessions, new businesses and events, public and corporate sponsorship and donations</p> <p>The restoration is expected to enable funding from agri-environment grants including Natural England Countryside Stewardship of around £10-15K per annum and agricultural subsidy i.e. Basic Payment Scheme of around £13K per annum</p> <p>Bristol City Council is facing a significant financial challenge and deep questions are being asked about its role in providing non- statutory services such as parks. Within this context, so called 'Alternative Delivery Models' need to be considered for the provision of parks and green spaces, currently maintained by the council. As such, one future option is for Stoke Park to be provided by a third party. The restoration of Stoke Park would make it more attractive for a third party to take it on.</p>	<p>All of those listed under option 2 The income generated by the creation of new visitor facilities e.g. café/shop, renting rooms would help support the Learning Partnership West and Ground Work</p> <p>Charges for the visitor car park would provide a modest income for the estate</p>
<p>Potential achievability</p>	<p>Based on current budgets this should be achievable</p>	<p>The key factors which help the project to succeed are:</p> <ul style="list-style-type: none"> • £1.12M Dowry which would enable the 20% Heritage Lottery match funding which is likely to be required. • The range of partners and their associated expertise and resources e.g the provision of cattle by the Brandon trust to graze the entire site. • Obtaining other grant money including agi-environment grants, Section 106 	<p>As with Option 2 but in addition the achievability will be helped by</p> <ul style="list-style-type: none"> • partnership working with Learning Partnership West and Ground Work making use of existing facilities provided by the adventure playground and buildings off Romsey Avenue to provide a visitor centre,

		<ul style="list-style-type: none"> Increasing the number of volunteers The political imperative to restore and manage Stoke Park for the benefit of the local community and wider city 	<ul style="list-style-type: none"> creating a small visitor car park on the Lockleaze open space adjacent to playground New bus services to be created for Lockleaze and Metrobus
Partner Capability and capacity	Only partner needed is the Stoke Park delivery Group	The involvement of Partners listed in section 5.2 will	
Potential affordability	Based on current budgets this is affordable	<p>The cost of delivering this option is estimated at £3.5m. The costs would be met by 80% grant from Heritage Lottery Fund and match funding from Stoke Park Dowry, S106 money, Countryside Stewardship Agreement, and Agricultural subsidies</p> <p>Revenue options explored as part of HLF bid include expected income from new income streams namely agricultural subsidy of £14k/yr, Countryside Stewardship £15k, Car Park £10K, events £0 concessions £30k, public and corporate sponsorship and donations, Dowry interest at £10k /yr and grant funding cover initial revenue costs</p>	See objectives/criteria table above. In summary: The cost of delivering this option is around £4m. The costs would be met by 80% grant from Heritage Lottery Fund and match funding from Stoke Park Dowry, S106 money, Countryside Stewardship Agreement, and Agricultural subsidies
Contribution to economic regeneration	None	This option is commensurate with raising the economic profile of the surrounding areas especially Lockleaze by making it a more attractive place to live and work, thereby attracting investment through development and new businesses which create job opportunities	This option is commensurate with raising the economic profile of the surrounding areas especially Lockleaze by making it a more attractive place to live and work, thereby attracting investment through development and new businesses which create job opportunities. It will also help with the viability of Learning Partnership West and Ground Work Centre and create new jobs such as the ranger.
Removal from the Historic England at risk register	The option will not remove the site from the register	The option will remove Stoke Park from the risk register by	This option is not necessary to remove the site from the risk register
Community impact	This option will have little or no	This option will result in enhancing people's enjoyment of	This option will result in enhancing people's enjoyment

PROJECT BUSINESS CASE

(PMO Template V10.00)

	benefits to the local communities	Stoke Park,	of Stoke Park, provide full time presence on the site increasing security, improving management and maintenance, creating learning opportunities and leading volunteers
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The total five year costs are made up of up-front capital costs and ongoing revenue commitments.

Cost profiles to be explored as part of stage I HLF bid development

Option	TOTAL 5 YEAR NET COSTS	TOTAL 5 YEAR NET BENEFITS	TOTAL COSTS LESS BENEFITS	PAYBACK PERIOD
Option 1				
Option 2				
Option 3				
Option 4				

PROJECT BUSINESS CASE



2.3 Preferred option:

Option 3 Remove the site from Historic England Risk Register, Improve visitor experience, community involvement and learning opportunities, but limiting capital costs by purposing the 'visitor/café/play facility is run by in partnership with Learning Partnership West and Ground Work South.

2.4 Preferred option key benefits & dis-benefits:

Benefits

- Offset risk of setting up car park and café by working in collaboration with partners
- Attraction of substantial external funding including up to £4m from the Heritage Lottery Fund and significant funding from the Natural England Countryside Stewardship Grant in the order of £100k revenue and £60K capital works, Lockleaze section 106 money potentially up to £160k, EU subsidy payments i.e. Basic Payment Scheme worth around £14k per annum ;
- Provision of full-time ranger which will help address anti-social behaviour issues, increase volunteer engagement, create education opportunities e.g. walks and talks carry out practical tasks e.g. path clearance;
- Creation of a destination park for benefit of people of Bristol and visitors from outside the city;
- National, regional and local recognition for removing Stoke Park registered park and garden and anti- aircraft Scheduled Monument from Historic England sites at Risk Register;
- Restoration / enhancement of biodiversity reflecting Site of Nature Conservation Interest designation ;
- Greater community engagement reducing anti-social behaviour and sense of ownership;
- Greater number of regular volunteers to help manage the site;
- An important educational resource for schools and colleges;
- Supports the local economy by increasing the number visitors to the site and raising the attractiveness to live and work in the surrounding area;
- Provision of infrastructure for events;
- The reintroduction of grazing will provide an agricultural output of the site with the food needs and choices of local residents and other end users in and surrounding Bristol. This will also remove the need to hay cut the site at cost of around £10k per year;
- Creation of all year round and all abilities access;
- Greater financial viability by creating opportunities for income generation, and
- Building long-term partnerships with key stakeholders and partners, which will help to sustain the Park and provide wider benefits for Bristol.

Dis-benefits

- Potential revenue from café would be lost to BCC if this facility was run by Groundwork South, also risk associated with limited control over 'Vench facility mitigatable by agreements;
- Higher maintenance requirements and implied higher revenue costs, mitigatable by new income (business case to be demonstrated) also option for significant volunteer input;
- Risk that income generation is lower than expected if project fails to attract number of visitors as expected. Option to seek CiL charge as city wide levy to provide sustainable income to provide Bristol with a new citywide recreation destination site;
- 20% match funding required based on a £4m projected investment i.e. £800k – if all taken from the dowry reducing its value to c. £300k as such there would be much smaller sum to address any unforeseen capital costs associated with asset failure.

Financial Assessment

Consultants are required to be appointed to quantify the preferred option capital costs and projected income and revenue liabilities.

2.5 Preferred option sensitivity and scenario analysis:

PESTLE analysis to be undertaken of the preferred option – following immediate work to quantify the capital programme and revenue liabilities

Analysis Criteria	Impact	Mitigation
Political		
Economic		
Social		
Technological		
Legal		
Environmental		

3. VALUE FOR MONEY

3.1 Preferred sourcing option (with rationale for its selection):

This relates to the implementation stage of the project

3.2 Key features of proposed contractual arrangement:

This relates to the implementation stage of the project

3.3 Procurement timetable & approach (with supporting rationale as necessary):

This relates to the implementation stage of the project. **4. AFFORDABILITY**

Financial impact table (Data from supporting financial spreadsheet):

Total project expenditure £'000	Funding required £'000	(Potential) Funding source(s)
£4m		Dowry £1.12m HLF £3.2m
(Notional) Payback Period	Maximum net benefits per annum	Budget(s) impacted by benefits
To be populated based on preferred option when identified		

5. ACHIEVABILITY

5.1 Key lessons learned from similar project(s) ([quick link to BCC lessons learned repository](#)):

BCC successfully applied for and implemented Heritage Lottery Funded projects to restore and enhance the Historic landscape features, properties, facilities and infrastructure at Ashton Court and Blaise Castle.

The lessons learned are:

- HLF funded project can result in substantial added value to Council investments in these two estates each receiving around £4.3m in grant out of total project costs of £5m and £6m respectively. This has resulted in major improvements in visitor experience and greater financial sustainability including revenue generation through car park charging, concessions, new businesses, job creation, property rents, deer meat sales and events as well as benefiting the wider economy as tourist attractions.
- It is very important that a city wide consultation on the proposals is carried out to ensure any investment made have taken into account stakeholders, partners and the public's concerns and expectations for Council owned estates
- The projects require substantial staff time commitments to manage the projects spanning over a number of years.
- HLF require the Council to enter into 25 year agreement to ensure the estates are, maintained according to an agreed management plan including obtaining Greenflag status. This requires resources to monitor that the plan is being implemented and updated to meet Greenflag status requirements.
- Numbers of visitors to both estates has increased significantly

5.2 Outline high-level project plan and approach:

HLF and Historic England have been encouraging of a bid from Bristol City Council to restore Stoke Park; negotiations are on-going but there is a clear prize to attract multi-million pound investment via a HLF approved programme matched using the Stoke Park dowry.

The following key stages are anticipated in progressing a HLF funded restoration plan for Stoke Park Estate (allowing for key council decision making, public consultation and the requirement for statutory approvals):

Timeline:

1. Stage 1 development grant bid submitted to HLF 28th February 2017;
2. Countryside Stewardship (CS) application submitted to Natural England April 2017;
3. Development Plan Phase (subject to stage I approval): 2-years from September 2017, to include detailed design and specifications, but on a 'no significant deviation' basis from ideas and plans submitted in the stage I HLF application, and
4. Stoke Park restoration implementation (subject to stage II HLF approval): 5- years' from 2020.

For the Stage 1 development grant bid, due to be submitted to HLF 28th February 2017. This

work package would include costing all the Conservation Management Plan proposals to a budget level, and then allocating them to either HLF or to a Countryside Stewardship (CS) agreement funding, in two coordinated but also potentially independent packages. Outputs would be:

- Quantify the two components of the capital works cost plan for HLF and CS;
- Quantify existing revenue status;
- Quantify the proposed components of the revenue cost plan (possibly three) for HLF only, CS only, HLF and CS combined;
- Quantify HLF application cost plan including revenue activities for the development and implementation stages.

Further work is required to understand and dove tail regeneration plans for Lockleaze including the re-development of the Romney House site, with a view to maximise financial benefits and connectivity.

Of note is that there are no time constraints on use of the dowry to be used as match funding for any HLF or other grant.

Stage	Milestone	Target Delivery Date
Making a developmental Stage 1 application to the Heritage Lottery Fund	Bid completed on time according to the brief included production of project cost plan and approved for funding by HLF	28 February 2017/June 2018
Undertaking developmental Stage 1 part of the project	Developmental plan completed on time and to budget	28 February 2018
Making a Stage 2 (Implementation stage) application to HLF	Application completed on time according to the brief and approved by HLF	September 2018/December? 2018
Undertaking the Implementation Stage 2 project programme	All works and activities completed on time and budget in accordance with the developmental plan and signed off by HLF	January 2023

5.3 Project resources required

Role	Key product(s)	Est. time required	Est. cost (New/Opp)
Project Manager	Stage 1 HLF application and City Wide consultation carried out on Stoke Park CMP	5 months	£3k
Project manager	Project development stage report produced and submitted to HLF	6 months	£100k? (funded largely by HLF grant)

Role	Key product(s)	Est. time required	Est. cost (New/Opp)
Project Manager	Stage 2 bid completed	5 months	£10k
Project Manager	Stoke Park Conservation Management Plan actions implemented, the registered park and Garden and WWII anti-aircraft battery Scheduled monument removed from Historic England at Risk Register	5 years	£4m (£3.2m grant funding)

5.4 Risk management approach:

The would be developed during the Stage 1 bid

5.5 Contingency plan:

The would be developed during the Stage 1 bid

6. OTHER INFORMATION / DOCUMENTS INCLUDED IN THE APPENDIX

Appendix 1: Heritage Investment Prioritisation (methodology adapted from Cornwall County Council) Bristol City Council owned and maintained heritage assets

7. DOCUMENT CHANGE HISTORY

Date	Version	Author	Amendment

Project Manager sign-off: Richard Ennion

Date:

Project Executive sign-off:

Date:

Finance Business Partner sign-off:

Date:

APPENDIX 1: FINANCIAL ASSUMPTIONS

PROJECT NAME:		PROJECT ID:	
PROJECT MANAGER:		VERSION:	DATE:

Assumption Ref (from financial spreadsheet line)	Type of cost (New or Opportunity)	Assumption Description	Variations to assumption	Confidence %	Further work to increase confidence

Officers have met with the Heritage Lottery Fund and agreed to the proposal that all HLF heritage bids in Bristol should be assessed using the *Heritage Framework* and scoring system derived from Cornwall County Council. This should ensure that all bids are assessed objectively as possible and submitted in coordinated way on year by year basis. It is intended all HLF bids will be assessed by a panel made up of BCC officers with a range of departments and expertise in the summer of 2016. As an interim measure, the Stoke Park HLF bid has been assessed using the scoring system (see results in appendix 1) and this found the project scored highly against all criteria.

APPENDIX 2: BUSINESS CASE HEALTH CHECK

ID	Health Check	Tick if actioned	Notes
1	Does the project support the organisation's objectives and current priorities?	Yes	
2	Is this project needed?	Yes	As defined
3	Have a reasonable range of options been developed and appraised for taking the Business Case forward? Has these options been developed with a Solution Architect?	Yes	
4	Is ruling out of potential options clearly justified?		
5	Have innovative approaches been considered and / or collaboration with others?	Yes	
6	Was the Business Case developed to the best optimised mix of benefits, time, cost & risk?		To be determined
7	Has appropriate sensitivity & scenario analysis been carried out (inc. worse case scenario)?	no	
8	Are there clear statements about risks and assumptions?		Emerging

9	Are Business Case risks being managed & allocated owners?		To be determined
10	Is the Business Case aligned with other key project management documents?		Outlined with further work required
11	Are all costs clearly stated and quantified? If not, is it clearly justified why not?		To be determined
12	Can the required budget be obtained to deliver the whole project?		Capital match available, revenue implications to be calculated
13	Has due consideration been given to the impact of a solution on the Council (i.e. architecture, equalities, environment, security etc?)		
14	Are the expected benefits clearly stated, with qualifying statements that show BCC has the capability to deliver? Do you have Budget Holder & Finance Business Partner sign-off?		Benefits outline, business discipline sign off required
15	Can this project be delivered with the organisations current capability / capacity? If not, can the required capability be acquired?		Yes subject to HLF stage I approval providing funding to recruit and provide capacity
16	Is the timescale realistic to achieve the scope? If not, can the scope and/or timescale be amended?		If approval given at People Panel to appoint consultants for September 2016 start a submission to HLF by 28 February 2017 is realistic
17	Is there a procedure in place to ensure the Business Case is regularly reviewed & kept up to date?		yes but to be determined following creation of project board
18	Are key stakeholders satisfied with the contents of the Business Case?		not yet shared
19	Is there an appropriate communication structure in place to keep key stakeholders informed of any amendments to the Business Case?		to be determined
20	Has the business case been submitted to the Centre of Excellence for formal review and sign-off by the Strategic Options Delivery Board (SODB)?		

Full Business Case Approval Process

