Sarah Briscoe House Transformation

Newtown & Llanllwchaiarn Town Council

Request for Proposals

Project Management Services

Contents

Sarah Briscoe House Transformation....1

Request for Proposals....1

Project Management Services....1

1 Introduction.... 1
2 Background Information.... 2
3 Service requirements: objectives and scope for Project Management services 3
3.1 Develop and deliver the Sarah Briscoe House Transformation.... 4
3.2 Financial management, resource procurement and fundraising 5
3.3 Interpretation, activity and business plans and volunteering.... 5
3.4 Safeguarding and Inclusion.... 6
5 Timetable.... 6
5 Contract Award Criteria.... 6
6 Proposals and information to be returned 8
7 Fee offer and information to be returned.... 8
8 Interview.... 9
9 Checklist.... 9
Appendix 1: Sarah Briscoe House Transformation: project management structure.... 10
Appendix 2: Referee details.... 11
Appendix 3: Insurance details.... 11
Appendix 4: Pricing schedule.... 12
Appendix 5: Declaration.... 13
Appendix 6: Summary of the project and the predevelopment phase work.... 14

Submission Receipt Deadline

23.59pm on Thursday 12th June 2025

1 Introduction

Sarah Briscoe House Transformation is seeking to appoint an experienced Project Manager contracted to the Newtown and Llanllwchaiarn Town Council and with a proven track record of delivering conservation building projects with high levels of participation from target groups, preferably projects funded by the National Lottery Heritage Fund (NLHF).

Following the successful application to NLHF, this is an exciting opportunity to lead and manage the Development Phase of the Sarah Briscoe House Transformation bringing together a team of consultants with a wide range of skills in business planning, activity planning, interpretation planning and fundraising to develop and submit a high-quality Round 2 application to NLHF. Subject to confirmation of Delivery Phase funding and satisfactory performance this appointment may be extended to lead and manage the Delivery Phase of the project.

The Project Manager will have overall responsibility for leading, overseeing and project managing the Development Phase of the Sarah Briscoe House Transformation in accordance with all NLHF requirements. The Project Manager will work closely on a day-to-day basis with the project board, the design team and all stakeholders, to ensure a successful joined up approach to all stages of the project.

This brief will:

- Provide background information on the Sarah Briscoe House Transformation
- Provide information on the required Project Management Services
- Provide instructions on how to submit a proposal.

The closing date for submitting a proposal is 23:59 on Thursday 12th June 2025.

The following documents are attached as appendices:

- Project management structure (Appendix 1)
- Referee details (Appendix 2)
- Insurance details (Appendix 3)
- Pricing schedule (Appendix 4)
- Declaration (Appendix 5)
- Summary of the project and predevelopment phase work (Appendix 6).

The RIBA 1/2 Design Team Report including costs and Consultation Report are available on request.

2 Background Information

Sarah Brisco House is a Grade II listed building at the heart of Newtown, and provides the community with a range of valuable services. The long-term future of both the historic structure, local services and heritage offer is under threat as although it's structurally sound, the old building is no longer fit for purpose and the services it provides can't be brought up to standard.

Back in 2019 the key stakeholders of Sarah Brisco House came together to explore opportunities to address the risks facing both the listed historic structure itself and the services it provides the community right in the heart of Newtown. The three main partners are:

- The Sarah Brisco Trust (Owners)
- The Robert Owen Museum (Volunteer led, located on the ground floor)
- Newtown Town Council (Anchor tenants and NLHF grantee).

Over the past four years the partners, led by the Sarah Brisco Trust, have undertaken extensive works to secure the ownership of this unique heritage building and to develop a plan to transform the building to overcome the threats facing it while also addressing local & regional priorities and needs. Their work drew on a large body of evidence including their own community & stakeholder consultations advice from heritage planning officers, architectural surveys, local and regional plans & strategies, and data from the recent development of the Newtown & Llanllwchaiarn Community Place Plan.

Drawing on the extensive body of evidence outlined above, we have identified three key aims that will address the community's needs & priorities:

- Securing a sustainable future for this significant listed building.
- Developing an accessible Community Resource Centre at the heart of the community.
- A Community engaged with its heritage.

A Feasibility study funded by the Architectural Heritage Fund considered the extensive body of evidence outlined above and considered various options to deliver our aims and overall vision. A preferred option was identified, which is considered the most viable, sustainable, and low risk option to achieve our aims. This option is the foundation for this application and the key elements are outlined below:

- **Expanding and transforming the dated Robert Owen Museum into a modern heritage attraction**: The ground floor will be adapted and developed into a modern museum telling the story and legacy of Robert Owen. Founder of the Cooperative movement and one of the most significant historical figures in Welsh history who was born on Broad St and is buried in the nearby Church. The museum will also incorporate other aspects of local and regional heritage, culture, and landscape

- **Transform the Council Chamber into a multifunctional digital space:** The current council chamber will be transformed into a multimedia conference room for public and business use, and an additional educational resource to complement the museum

- **Improve access for all to the public spaces**: Accessibility to all the building will be improved including reconfiguring doorways, moving the main entrance, installing a lift to the first floor, and catering for the visually impaired & hard of hearing

- **Create new communal/business/retail spaces:** Currently underutilised spaces including the courtyard will be reconfigured to host local businesses alongside the town council offices. We will also refurbish the underused offices in the Northern section.

The aim is to improve accessibility to the public spaces, create new income streams through leasing additional office and retail space to maintain the historic structure, and create a new multifunctional facility for the benefit of the wider community including 3rd sector groups, businesses, and schools.

The next stage is to secure the funding for detailed development, and then to complete the necessary capital works to realise the long-term vision.

3 Service requirements: objectives and scope for Project Management services

We are seeking an experienced Project Manager with a proven track record of:

- Delivering heritage projects with high levels of participation from target groups

- Managing and overseeing the completion of high-quality Round 2 applications to NLHF, including co-ordinating the production of all R2 reports and material as well as writing the application form to meet NLHF requirements
- Working collaboratively with a range of consultants, stakeholders and beneficiaries.

This is an exciting opportunity to lead and manage the Development Phase of the Sarah Briscoe House Transformation bringing together a team of consultants with a wide range of skills in business planning, activity planning, interpretation planning and fundraising to develop and submit a high-quality Round 2 application to NLHF. Subject to confirmation of Delivery Phase funding and satisfactory performance this appointment may be extended to lead and manage the Delivery Phase of the project.

The Project Manager will:

- have overall responsibility for leading, overseeing and project managing the Development Phase of the Sarah Briscoe House Transformation in accordance with all NLHF requirements. Working closely on a day-to-day basis with the Design Team and all stakeholders, to ensure a successful joined up approach to all stages of the project
- lead and deliver effective project management and oversight of a diverse team of consultants and staff in the Development Phase of the project to produce a high-quality Round 2 application
- provide high-quality, effective partnership working with local people and our external partners.

The Project Manager will be required to understand the Project by drawing on existing work, including the Consultation report attached to this brief, and other research in order to familiarise themselves with Sarah Briscoe House Transformation.

See Appendix 1 for Project Management Structure

The Project Manager will lead on the development and delivery of the following work:

3.1 Develop and deliver the Sarah Briscoe House Transformation

3.1.1 Support and lead on the submission of a high-quality Round 2 application to NLHF for Delivery Phase funding, ensuring the requirements for the submission are fully met.

3.1.2 Working with the Project Board to ensure full compliance with the requirements of funding bodies including NLHF.

3.1.3 Lead on the recruitment of external consultants, developing tender documentation and procuring the services required, ensuring all procurement processes are carried out in compliance with both the NLHF and Council requirements.

3.1.4 Commission and manage key external consultants (for example in business planning, activity planning, interpretation planning and fundraising), working with them to ensure that the delivery of the work is carried out as described in the relevant briefs.

3.1.5 Work collaboratively with the Design Team including Conservation Architect, and other consultants (for example Conservation Plan Consultant and QS Consultant).

3.1.6 Ensure that all tender briefs include clear expectations in relation to apprenticeships, employment, and training opportunities for local people including volunteers, and how these will be assessed and monitored through the contract.

3.1.7 Ensure that specialist consultants deliver the agreed programmes of work with the active involvement of the community including young people, within budget and to agreed timescales, and in accordance with the requirements of NLHF and other funding bodies.

3.1.8 Monitor progress and resolve issues, providing regular reports, including those to NLHF, and the Project Board.

3.1.9 Liaise between the three partners and all externally appointed consultants to represent the interests of the community and young people.

3.1.10 Work with the Design Team, and Project Board to achieve RIBA Stage 3 designs for Sarah Briscoe House, statutory consents and NLHF Round 2 documentation to submit to NLHF.

3.1.11 Work with the Project Board to ensure that the Participation and Conservation aims of the project meet the needs of the community and young people and Sarah Briscoe House staff, and the requirements of the NLHF.

3.1.12 Update the risk registers and manage risks.

3.1.13 Lead reviews of policies, procedures, protocols and risk assessments relating to the NLHF project as required.

3.2 Financial management, resource procurement and fundraising

3.2.1 Lead the project budget, keep financial records and work with the Council's Responsible Finance Officer to prepare monthly reports on expenditure including budget and cashflow reports for NLHF – and ensure that project adheres to budget.

3.2.2 Ascertain the timetable, terms and conditions of each financial resource to ensure the compliance of the funded development and delivery work.

3.2.3 Prepare and submit grant claims for the project, working with the Responsible Finance Officer.

3.2.4 Assess and submit to the Responsible Finance Officer for committee approval all payments to consultants and professional advisors.

3.2.5 Identify additional sources of funding to deliver the match funding requirements to contribute to grant applications for capital and revenue work, supporting exploratory talks with funding bodies, and report as required to funders.

3.3 Interpretation, activity and business plans and volunteering

3.3.1 Commission and manage consultants in the delivery of business and activity planning, interpretation, evaluation and special projects. Examples of work to be commissioned include:

(a) commission the Interpretation Planning Consultant and support creation of the Development Phase Interpretation Plan for Sarah Briscoe House Transformation project;

(b) commission and work closely with the Business Plan Consultant to deliver the whole Project Business Plan building on work previously undertaken;

(c) commission a high-quality, 5-year Activity Plan ensuring that the Activity Planner works well with the Museum Team;

(f) commission a high-quality Evaluation Plan, providing both an evaluation of the Development Phase and framework for the Delivery Phase.

3.3.2 Work closely with the Project Board, ensuring that local people's ideas and materials are central to all elements of the project.

3.3.3 Work with the Activity Plan consultant and partners providing support and guidance to ensure that the activity and volunteering programmes are designed with a diverse group of local people and that local people are involved in decision making.

3.3.4 Work with our Partners to provide key skills and expertise, forming strong links with heritage initiatives and organisations locally and with educational partners.

3.3.5 Ensure that the Activity, Interpretation and Business Plans inform the capital designs and layouts for Sarah Briscoe House.

3.3.6 Develop a Communications Plan and work with the Council to ensure stories and successes are shared regionally and nationally through key partners.

3.4 Safeguarding and Inclusion

3.4.1 Working closely with the three partners ensure safeguarding of the welfare of children, young people and vulnerable adults – working within the Council's safeguarding policies.

3.4.2 Ensure a diverse and culturally sensitive approach to all aspects of the project.

3.4.3 Ensure and promote safe working environments.

5 Timetable

The term of the Contract will be for the Development Phase of the project until submission of NLHF Round 2 application i.e. July 2025 to August 2026.

The Contract may be extended beyond this period for the delivery of Services by two months within the commission cost, subject to planning permissions, a satisfactory review of performance and by the agreement of both Parties.

The closing date for submitting a proposal is 23.59pm on Thursday 12th June.

Interviews for shortlisted consultants will be held week beginning 16th June 2025.

5 Contract Award Criteria

For the avoidance of doubt the Council retains the right to not award any contract in relation to this Invitation to Tender. The Council does not bind itself to accept the lowest or any tender but will be seeking competitive all-inclusive lump sum Fixed Fee tenders for the duration of the construction works.

Tenders are invited to values in the region of £45,500.

Tenderers should note that the contract awarded will contain a break clause to cease the service and cancel the contract without recourse, in the event that either the project does not secure the necessary 2nd Round NLHF delivery funding, the delivery of the services to Round 2 was unsatisfactory or insurmountable planning issues arise that prevent the project being completed.

Should the Council wish to award a contract it will be awarded on the basis of whom offered the best value taking due account of relevant experience, previous performance on similar projects, commitment to the project, Social Value and the service being value for money against the overall project budget. The Council will assess the tenders against the following *(please prepare your responses in this chronological order):*

No	Contract Award Criteria Question	Weighting for quality score

1	Please identify your proposed team, stating their roles, responsibilities, capabilities and place of work. Please include details of any PM accreditation. Please provide full CV's in order that the client can ascertain the nominated individuals' qualifications and experience.	20%
2	Please provide details of the most recent two projects that your or your practice has been involved with that are of a similar size, scale and type to that at Sarah Briscoe House, with a particular focus on heritage listed buildings. Please include any examples that demonstrate experience of: • Grade I, II* or II listed buildings; • Creative reuse of important historic buildings; • Completing major projects with voluntary and community sector clients; • Experience of completing major NLHF funded projects. Please describe how you would apply the experiences gained from the examples given to the delivery of this project.	20%
3	Please describe your ability to adequately resource the various stages and meet the programme requirements.	10%
4	Please demonstrate your outline process for undertaking the works required of you. Please include: • The project management methods you've used in the past and the tools you have experience with (400 words) • An example of when you encountered a new problem/something went wrong with a project you were leading on, and how you gathered the information to solve this issue(s) (400 words)) • Your approach to risk management (400 words).	20%
5	Please describe how you would address the working relationships with the client, other consultants, the community and young people. Please include how you will ensure a highly coordinated, collaborative and iterative approach. Please include how you will ensure timely and robust responses to all queries and request for information. (400 words).	10%
6	Please provide details of recent projects or initiatives where, as Project Manager, you have ensured that other consultants and contractors have delivered opportunities and community benefits in each of the Plans that are required for HF Round 2 submission. (max 400 words).	10%
7	Social Value: Please describe in detail how you will provide additional social value through delivery of the project. Please include how the activities you propose will provide opportunities for harder to reach groups to develop their skills. Please detail any wider community activities and benefits your team will deliver through your involvement in the development and delivery of the project.	10%

6 Proposals and information to be returned

The consultant should submit:

- **Responses to questions in section 5.**

- **Two References (Appendix 2)** please provide details for two Referees that you have undertaken project management services for with reference to similar types and size of contracts.
    - Referees would be willing to discuss the Supplier's performance with the Council. The Council reserves the right to contact any or all of these Referees to seek clarification.
    - For contact purposes, please provide the details of the Referees in Appendix 2.

- **Details of your insurance cover for the following (Appendix 3)**
    - Professional Indemnity Insurance
    - Public Indemnity Insurance
    - Employers Liability Insurance.

- **Pricing schedule (Appendix 4)** providing a single lump sum fixed fee inclusive of all normal expenses, based on the services required as set out in Section 3 – showing day rate and time involved.

- **Declaration (Appendix 5)**

All proposals should be submitted via email with subject line 'SBH Transformation Tender' to by 23:59 on Thursday 12th June 2025.

7 Fee offer and information to be returned

The Consultant should submit a proposal on the basis of the following:

- The consultant's fee and proposal should be based on submission of Heritage Fund Round 2 Application in August 2026.

- Consultants MUST confirm in their proposal submission that they are able to comply with all project timelines described in this document.

- The consultant is required to submit a single lump sum fixed fee inclusive of all normal expenses, based on the services required as set out in Section 3 showing day rate and time involved.

- Expenses and administrative costs should be included within the fixed fee.

- Your proposal can be submitted via email and should include a summary of work you will deliver, covering services required as set out in Section 3.

- Should additional work be required outside the scope, the Contractor agrees that these day rates will be applied.

- All fees and rates should exclude VAT but must include all charges, costs, disbursements and expenses (including, without limitation, travelling and other expenses, all relevant taxes, other than VAT, duties and other relevant and applicable sums).

- Fees will become payable on the basis of completed stages of work agreed and set out by you and Sarah Briscoe before of the commission.

- You should advise if you have any comments on the proposed services.

- You should confirm that the Council's standard terms and conditions are acceptable.

8 Interview

Interviews for shortlisted consultants will be held week beginning 16th June 2025.

The purpose of the interviews will be to assist in scoring the quality of the proposals received and to give the Council the opportunity to meet the proposed consultant. Instructions about the interview, if required, will be issued separately on successful shortlisting. The Council reserves the right to appoint on the basis of written submissions if it so wishes and is not bound to accept any offer it receives.

If you have any questions, please contact E J Humphreys, Town Clerk, Newtown and Llanllwchaiarn Town Council (townclerk@newtown.org with subject line 'SBH Transformation Enquiry', or telephone 01686-625544).

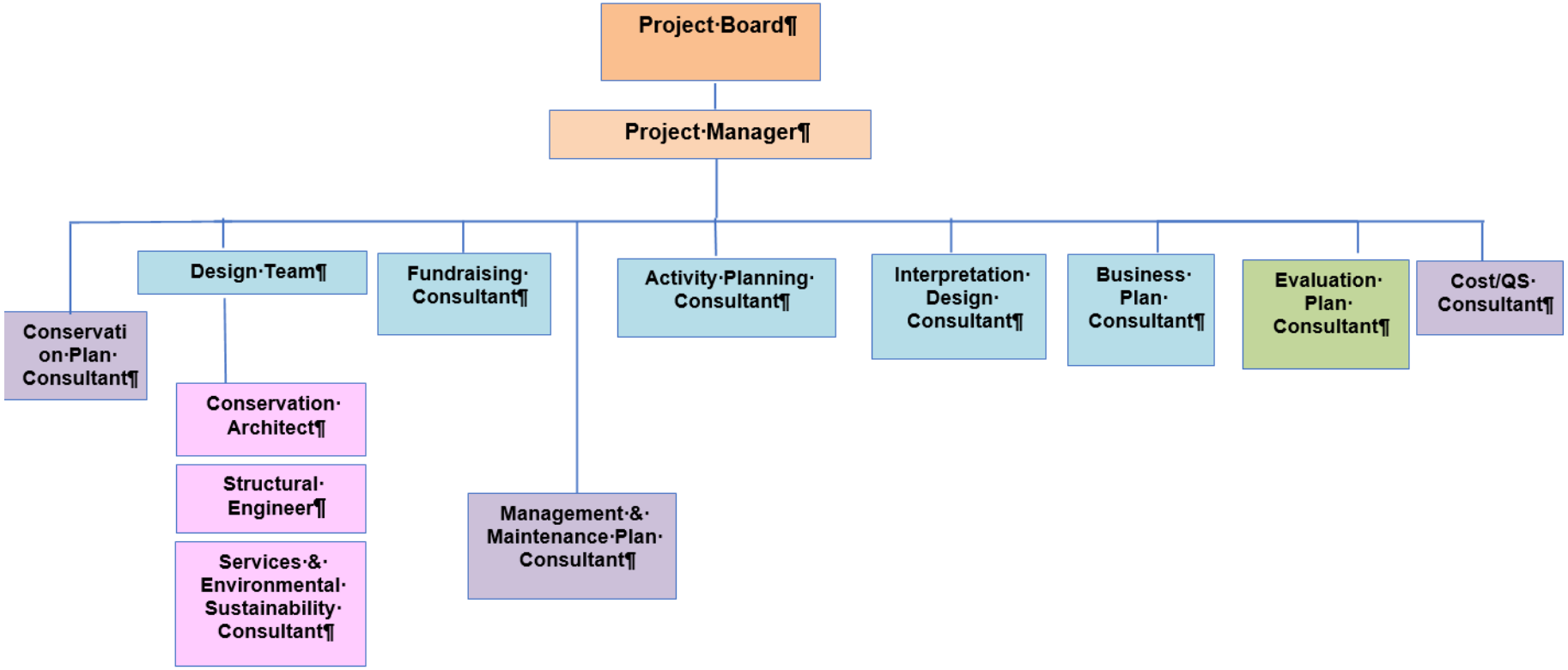
The Invitation to Tender / submit a quotation and any other information issued by the Council relating to the services shall be treated by you as confidential and shall not be disclosed in whole or in part to any third party without the prior consent of the Council.

Please use the following Checklist to help you ensure that all requested information is enclosed with the completed proposal**.**

9 Checklist

	If Yes, please tick
Have you provided **two relevant, recent examples** as requested in Section 3	
Have you provided a **Method Statement**, addressing all questions in Section 5 including involvement of local people?	
Have you supplied details for your **references** (Appendix 2)?	
Have you provided details of your **insurances** (Appendix 3)?	
Have you completed the **Form of Tender**, including the Pricing Schedule and Resource Schedule (Appendix 4)?	
Have you completed the **Declaration** (Appendix 5)?	

Appendix 1: Sarah Briscoe House Transformation: project management structure



Appendix 2: Referee details

Referee 1	
Full Name of Referee	
Job Title	
Company / Authority Name	
Address	
E-mail Address	
Telephone Number	
Description of the works carried out of a similar nature for this Referee. Max 100 words	

Referee 2	
Full Name of Referee	
Job Title	
Company / Authority Name	
Address	
E-mail Address	
Telephone Number	
Description of the works carried out of a similar nature for this Referee. Max 100 words	

Appendix 3: Insurance details

Employers' Liability Insurance - *must be £10million minimum each and every claim; unlimited in any one year:*

Name of insurer	
Address	
Type of insurance	
Policy numbers	
Expiry date	
Limits of indemnity *(per occurrence and annual aggregate)*	
Excess *(if any)*	

Public Liability Insurance - *must be £5million minimum each and every claim; unlimited in any one year:*

Name of insurer	
Address	
Type of insurance	
Policy numbers	
Expiry date	
Limits of indemnity *(per occurrence and annual aggregate)*	
Excess *(if any)*	

Professional Indemnity - *must be £2million minimum each and every claim; unlimited in any one year:*

Name of insurer	
Address	
Type of insurance	
Policy numbers	
Expiry date	
Limits of indemnity *(per occurrence and annual aggregate)*	
Excess *(if any)*	

Appendix 4: Pricing schedule

UNCONDITIONAL AND IRREVOCABLE OFFER TO Sarah Briscoe House Transformation
Re: Request for Proposal for the provision of Project Management Consultant services required by the Council in connection with the Sarah Briscoe House Transformation development proposals outlined above.

Having read carefully the Request for Proposal Invitation and in respect of you considering this Request I/we offer to supply the services specified and to complete the tasks set out in Section 3 and elsewhere in this document as described for the fixed sum of:

£ ..... (enter amount in words here) .....

.....excluding VAT.

The single lump sum fixed fee is inclusive of all normal expenses and administrative costs based on the services required as set out in Section 5 for the Request for Proposal document.

Please note that we anticipate fee proposals in the region of £45,500 depending on the level of skills and experience, hours committed to the project and ability to lead and deliver the overall project.

To be clear this tender relates to the Development Phase only of the project.

Day rate:

Time involved:

Appendix 5: Declaration

I / We certify that:

1. We have not been convicted of nor are currently under investigation for any acts of conspiracy, corruption, bribery, fraud, money laundering, such acts as defined by the relevant UK law, nor any other offence within the meaning of Article 45(1) of the Public Sector Directive.
2. We are not bankrupt nor have had a receiving order or administration order or bankruptcy restrictions order made against us nor are in the process of or about to commence any composition or arrangement with or for the benefit of our creditors or, if registered as a partnership under Scots law, have not been granted a trust deed or is subject of a petition for sequestration of our estate.
3. We have not, nor are about to, be subject of a resolution or order for winding up, nor have has a receiver, manager or administrator.
4. We have not been convicted of a criminal offence relating to the conduct of our business or (being an individual) not been guilty of grave misconduct in the course of its business.
5. We have fulfilled our obligations relating to the payment of social security contributions and the payment of taxes in accordance with the legal provisions of the country in which it is established and / or the United Kingdom.
6. We have not been found guilty of serious misrepresentation in providing any information under Regulation 57 of the Public Contract Regulations 2015.
7. We have not suffered a deduction for liquidated or ascertained damages in respect of any contract nor had a contract cancelled, or not renewed, for failure to perform nor been the subject of a claim (contractual or otherwise) based upon a failure of quality in design, work, materials or services within the last three years.
8. Where part of an Organisation, none of the senior personnel of the Organisation have been involved (in a similar position) in any company which has gone into insolvent liquidation, voluntary arrangement, receivership or administration or been declared bankrupt.
9. We comply with the requirements of the Equality Act 2010 and previous equality legislation, and we promote Equal Opportunities and adhere to Equality and Human Rights Legislation.
10. We understand that this role include contact with children and vulnerable young people and agree to providing a Disclosure and Barring Service (DBS) check if selected.

I / We confirm and attest that the foregoing information and declarations are accurate to the best of my / our knowledge and that I / We acknowledge and accept that any false information could result in our application being rejected or, in the event that any false declaration is discovered after the award of any contract, may lead to the rescission of any contract awarded.

Signature:

_____

Name (printed):

_____

Dated:

_____

Capacity / Title:

_____

Address:

_____

Appendix 6: Summary of the project and the predevelopment phase work

See following Round 1 Application Form to NLHF.

[redacted] [redacted]

Project: 00004814

Project reference number	NL-22-00178	**Status**	New
Organisation Name	Newtown and Llanllwchaiarn Town Council	**Withdrawn on**	
Contact Name	Ed Humphreys	**Delivery Round**	
Area / Country	Wales	**Application Submitted?**	☑
Expression Of Interest	EOI-00001121	**Submission Date/Time**	17/08/2023, 10:13
Case paper	CP-00044536	**Development grant expiry date**	31/12/2024
Decision meeting	Wales - Committee - 30 November 2023	**Internal review only?**	☐
		Strategic Plan Version	SFF5
		Programme	National Lottery Grants for Heritage: Grants from £250,000 to £5,000,000
		Heritage area	Historic Buildings and Monuments
		Heritage area subcategory	Historic buildings

Grant Details

Total payments requested	£0.00	**Amount requested as percentage of award**	0.00%
Total payments paid	£0.00	**Amount paid as percentage of award**	0.0000000%
Remaining grant	[redacted]	**Total amount authorised**	£0.00

Project address

Project & organisation address the same?	☐	**Ward**	Newtown East
Project street	The Cross, Broad St,	**Constituency**	Montgomeryshire
Project city	Newtown	**Local authority**	Powys
Project county	Powys	**Region**	null
Project postcode	SY16 2BB		

Previous relationship with The Fund

First application?	Yes
Most recent project reference number	N/A
Most recent project title	N/A
Advice received in planning the project	Summary of specialist advice received. During the initial phase of the project in 2019 we commissioned Resources for Change (R4C) to advise and support us to engage with the key partners and stakeholders. R4C Directors Alison Davies and Cerys Thomas initially assisted us to consult with the current users to develop an initial collaborative vision and

aims for the project.

Since the R4C Director Deio Jones has been supporting and advising us as we've consulted with the wider communities to refine these initial ideas, and to tie in with existing local consultations and studies, as well as aligning with relevant policies, strategies, and priorities.

We've had ongoing support from Adam Hitchings at the Architectural Heritage Fund (AHF), who has advised us on best practice and shared learning from other similar projects. The AHF have also followed up this advice with financial support for a Viability Study (2022), and with funding for more detailed development, which will be used as Match Funding for this NLHF Development Stage application. Edward Humphreys (Town Clerk) and Sorelle White (Democratic Services Manager) of Newtown Town Council was a great help with regards to sharing the consultation data and developing our proposed project in line with the strategic aims of the Newtown and Llanllwchaiarn Place Plan.

Doug Hughes and his staff at Hughes Architects, who are based in Newtown, provided initial advised (free of charge) around the potential development of the building from a structural and planning point of view. They followed this up with more detailed plans of number of costed proposed plans as part of the 'Viability Study' funded through the AHF. Hughes Architects have also kindly provided (and recently updated) estimated costs of the required capital works for this NLHF development stage application.

We have also had brief discussions with Sam Lloyd Clayton, the Town Centre Regeneration Lead at Powys County Council, to discuss potential plans to gauge support and scope out potential additional funding in the future.

We've also received advice and guidance from Cathryn Evans from NLHF, thank you!

Consultation with our local community, stakeholders, and partners.

In 2019 R4C led an initial stakeholder & user consultation which developed our initial vision and aims based on their collaborative feedback on current circumstances, historical usage, and the perceived local needs going forwards.

An AHF funded 'Viability Report developed this initial work further included an options appraisal informed by costed plans by Hughes Architects, which has enabled us to identify a preferred way forward to address these needs and opportunities.

For this Viability/Feasibility Report we drew on the extensive community consultation undertaken in developing of the Newtown and Llanllwchaiarn Place Plan to identify local needs & priorities. This extensive body of work was conducted over 2 years (2019-21) and was far more thorough and expansive than anything we could have done ourselves. The Place Plan along with the appendixes and underlying publicly available data & evidence (we were also given access to additional raw data as our project aims to directly deliver some of their strategic aims) can be found at the link below.
https://newtown.org.uk/consultations/placeplan.html

How it's shaped this project proposal.

This project has been developed specifically to address specific risks facing the building and opportunities it offers, and these have been tied in with the wider local needs and opportunities of the communities of Newtown and the surrounding communities.

The whole project proposal is shaped to address the needs and opportunities identified by the community and stakeholders,framed by what is structurally feasible and financially sustainable in the long term.
Pre-application/planning etc advice received.

A Pre-App Built Heritage enquiry was submitted to Powys County Council (PCC). The response followed a site visit by the Built Heritage Conservation Officer Dr Sam Johnson considered the two proposals identified in the Viability (Feasibility) Study and concluded that both are feasible with no aspect ruled out.

However they noted that one option had a much greater impact on the historic fabric of the building and would therefore require a lot more evidence to justify the development if this option was to be taken forward.It would also be much more costly.This was one of the main reasons to discard this option and go with the alternative as a preferred choice.
The response also highlights the need for Listed Building Consent, accompanied by a Heritage Impact Assessment. CADW and other national amenity societies would be consulted through this process at this stage as advised.

We also submitted a pre-app building control enquiry to PCC, however the reply from Planner Luke Woosnam indicated they had very little to add to the built heritage advice and kindly provided a refund on the enquiry.

Your project

Project title Sarah Briscoe House Transformation

Project Summary

Sarah Brisco House is a Grade II listed building at the heart of Newtown,and provides the community with a range of valuable services. The long-term future of both the historic structure,local services and heritage offer is under threat as although it's structurally sound,the old building is no longer fit for purpose and the services it provides can't be brought up to standard. A major issue is that a viable business model depends on its continued hosting of the Town Council as anchor tenant who take on all the maintenance and running costs, but the building's condition and accessibility currently mean they are inconsistent with their Equality Act obligations and could be forced to leave.

Back in 2019 the key stakeholders of Sarah Brisco House came together to explore opportunities to address the risks facing both the listed historic structure itself and the services it provides the community right in the heart of Newtown.The three main partners are:

• The Sarah Brisco Trust (Owners)
• The Robert Owen Museum (Volunteer led, located on the ground floor).
• Newtown Town Council (Anchor Tenants)

Over the past four years the partners, led by the Sarah Brisco Trust,have undertaken extensive work to secure the unique heritage of the building by developing a plan to transform the building to overcome the threats facing it while also addressing local & regional priorities and needs.Their work drew on a body of evidence including their own community & stakeholder consultations (supported by R4C),advice from heritage planning officers, architectural surveys, local and regional plans & strategies, and existing consultation data from the recent creation of the Newtown & Llanllwchaiarn Community Place Plan.

Drawing on the extensive body of evidence outlined above, we have identified three key aims that will address the community's needs & priorities:

• Securing a sustainable future for this significant listed building.
• Developing an accessible Community Resource Centre at the heart of the community.
• A Community engaged with its heritage.

A Feasibility study funded by the Architectural Heritage Fund considered the extensive body of evidence outlined above, and considered various options to deliver our aims and overall vision. A preferred option was identified, which is considered the most viable, sustainable, and low risk option to achieve our aims. This option is the foundation for this application and the key elements are outlined below:

• Expanding and transforming the dated Robert Owen Museum into a modern heritage attraction and resource centre:The ground floor will be adapted and developed into a modern museum telling the story and legacy of Robert Owen. Founder of the Cooperative movement and one of the most significant historical figures in Welsh history who was born on Broad St and is buried in the nearby Church. The museum will also incorporate other aspects of local and regional heritage, culture, and landscape.
• Transform the Council Chamber into a multifunctional digital space:The current council chamber will be transformed into a multimedia conference room for public and business use, and an additional educational resource to complement the museum.
• Improve access for all to the public spaces:Accessibility to all the building will be improved including reconfiguring doorways, moving the main entrance, installing a lift to the first floor, and catering for the visually impaired & hard of hearing.
• Create new communal/business/retail spaces:Currently underutilised spaces including the courtyard will be reconfigured to host local businesses alongside the town council offices. We will also refurbish the underused offices in the Northern section. Not only will this be a boost to the town centre and local businesses, but it will also provide additional income to maintain and sustainably reinvest in Sarah Brisco House and its heritage facilities going forward.
• We will employ a 'Project Manager' to manage the project:We also intend to employ a 'Community Heritage Coordinator' to engage the community, build relationships with local stakeholders, and develop the educational and social offer. Alongside rent from businesses we'll build a resilient financial future for this unique heritage building.

The aim is to improve accessibility to the public spaces, create new income streams through leasing additional office and retail space to maintain the historic structure, and create a new multifunctional facility for the benefit of the wider community including 3rd sector groups, businesses, and schools .

The next stage is to secure the funding for detailed development, and then to complete the necessary capital works to realise the long-term vision. We also intend to develop a comprehensive business plan for the heritage, and develop our capacity to sustainably manage it. We believe that the National Lottery Heritage Fund will be the perfect funding partner to help us realise our vision.

Need an opportunity

Heritage Management & Condition
The listed building is currently structurally sound but its future depends on its continued use & value to the public.
The current management model relies heavily on the Town Council;they provide rental income as tenants,are responsible for the building's maintenance and running costs,and their staff enables the Museum to be accessible to the public during the week.
However the current arrangements are unsustainable as the building doesn't meet the accessibility criteria in the equalities act.This will eventually force the Town Council to move out and then it's difficult to see a viable future for the building that maintains its key heritage assets.

A complex layout with off-set floors leads to a substantial amount of wasted space and is a major barrier to developing the museum & other facilities to provide additional community and heritage facilities & income.Like most old buildings the energy and maintenance costs are very high.
Engagement with heritage
The Robert Owen Museum is the only museum dedicated to the globally renowned and significant figure in our history as a Nation but It's extremely dated and doesn't meet the modern standards & expectations of visitors or education providers so the potential to engage people with heritage is greatly diminished.The museum is managed by volunteers but they lack capacity in numbers & expertise to develop it to engage more people. It's currently solely focused on Robert Owen and there is potential to engage with a wider range of local heritage e.g. the location of the first mail-order retail business(19th century entrepreneur Pryce Jones) & the first Chartist demonstration in Wales-1838.
Much of the building and its heritage features is currently inaccessible to the public & there are no toilets.Making it accessible would enable us to engage new audiences.
Local schools have identified the educational potential of the facility for their pupils & other groups.
Addressing these issues and opportunities:
Condition & Management:
• Improving accessibility to secure long term investment of Town Council
• Improving energy efficiency
• Developing new income streams
• Developing volunteer & staff capacity
Engagement:
• The RO Museum will be expanded & transformed to provide a modern heritage attraction to attract & engage new audiences with a wider range of heritage
• Volunteers recruited and trained
• Accessibility improved
• Council Chamber becoming a new education facility

Strategic Fit
Our project contributes to delivering local regional and national strategies related to regeneration, economic development,health & wellbeing:
National:
• The Historic Environment (Wales) Act:2016
• Planning Policy Wales
• Well-being of Future Generations Act (Wales):2015
Regional:
• Powys Local Development Plan-2018
• Powys Wellbeing Plan-2018
• One Powys Plan
Local:
• Newtown and Llanllwchaiarn Place Plan
• Finding a New Route(Tourism)
• Town Council Strategic Business Plan 2023-28
• Newtown Brand

Previous feasibility studies & options appraisals
This project has been developed specifically to address specific risks facing the building and opportunities it offers and these have been tied in with the wider local needs and opportunities of the communities of Newtown and the surrounding communities.
External Condition Survey Report by McCartneys Planning & Survey & photographic schedule of condition(2019) & internal Condition Survey Report by Bowen Consultants Ltd(2016).
In 2019 R4C undertook an initial stakeholder & user consultation and supported the drafting of initial business case. We've also drawn on extensive public consultation undertaken for the Newtown & Llanllwchaiarn Place Plan to identify local needs & priorities.
An AHF funded 'Viability Report included an options appraisal informed by costed plans by Hughes Architects which has enabled us to identify a preferred way forward to address these needs and opportunities.This body of needs to be developed into a comprehensive business plan to ensure the sustainable future of the building and its heritage.
Townscape Improvements
SB House is a Grade II listed building and prominent landmark located in Newtown Town Centre, located within a Conservation Area identified in the Powys LDP as "being an important strategic asset that requires protection from unacceptable development so as to protect the economic, environmental and social well-being of Powys."
SB House & adjacent Victorian Clock Tower are the iconic centrepiece of the townscape and are an important part of our heritage. Maintaining the distinct character of the town depends both on the conservation of these structures and the ability to tell the story of our rich heritage to future generations.
The ward (Newtown East) is amongst the 20% most deprived in the country.To address this the Town Centre is currently undergoing a number of regeneration projects,of which the proposed development of SB House is a key element.

Why does the project need to happen now?

Tell us if the risk to your heritage is critical.

Although the building is currently structurally sound thanks to repairs carried out by the Town Council, current arrangements are financially and operationally unsustainable in the long run and we need to act now before the building, its heritage, and its services, are lost.

Due to the historical complexities (see next section) the SB Trust were only to register ownership of the building with HM Land Registry in 2021. Now that this is in place we are able to undertake the long overdue transformation work that is desperately needed to secure the future of the building.

As mentioned, the management model of the heritage asset is dependent on the anchor tenant, the Town Council, paying rent and covering all maintenance and energy cost. In effect they are hosting and funding the Robert Owen Museum and reading room to preserve and promote the heritage for the benefit of the community. They are happy to do this, as they see Sarah Brisco House and its heritage assets as key to the regeneration of the town centre, and it also ensures that their civic services are located at the heart of the community.

However the Town Council is currently in potential breach of its legal obligations as the building doesn't meet the criteria in the equalities act with regards to accessibility. Public access to the Council Chamber is not possible, and the grand staircase means that there is no disabled access to their offices or the chamber (which is itself an underused heritage asset) on the first floor. Unless there is imminent progress, the Town Council could be forced to move to new premises to comply with regulations. Without them it's difficult to see a viable future for the building that can maintain and develop its key heritage assets. Any private sector tenant would almost certainly want to utilise the ground floor for commercial purposes, which would mean displacing the Robert Owen Museum to another section of the building, which could be no more than a few converted offices.

The much more likely scenario is that because of the condition that a museum and reading room must be provided to the community, the building would be unattractive to a private sector tenant or and would therefore remain vacant and fall into disrepair and ruin as the volunteers of the Sarah Brisco Trust have no means or capacity to maintain it on their own. And the museum would have to close.
The Museum is also in desperate need of modernisation as it's not fit for purpose in the 21st century. The volunteers also need support because if they lose a few more to old age and ill health they won't be able to maintain it, and it's impossible to attract new blood with the current facilities.

Tell us about any partnership funding that is available to you now that won't be in the future.

The value of this project, including all capital works and revenue, is estimated at just over a million pounds. This would mean that we need to fin [redacted] match funding. Currently this could be secured through the AHF (who have been very supportive and funded the initial development of the project) capital grant fund. However in the current climate there is no guarantee that this fund will be available in 12 months' time to the same level. And with the timings not right for Shared Prosperity Funding, it's difficult to guarantee any potential funding 24 months in advance. Funding for such projects in the third sector is getting much more competitive, and if we don't secure it soon there's a risk that we will miss the opportunity completely.

The Sarah Brisco Trust & Robert Owen Museum have their own reserves, but the levels are very low and they are being eroded annually (e.g through developing this project) as they can't grow or diverse their income streams with the current facility. And if the Town Council vacates and the rental income ceases, then both organisations would face a bleak future financially.

Tell us what will happen if you do not get a grant from us.

If we aren't successful with this NLHF application, there isn't another funder that is able to invest to a significant enough level based on the safeguarding and promotion of the heritage assets. We wouldn't be able to modernise the museum or improve access, and as therefore the current heritage (Museum & Reading Room) & Civic services would be at imminent risk, and that would threaten the future of the unique heritage building of Sarah Brisco House itself.

These issues need to be addressed now whilst there is a strong stakeholder group established and some resources, both financial and people, to drive the work forward. If key stakeholders are forced to relocate and/or the building deteriorates further and needs urgent repairs, they will lack the resources to undertake the work and the long-term future of the building will be at risk.

Who will benefit from the project?

We have identified three key aims for this project:
• Securing a sustainable future for this significant listed building.
• Developing an accessible Community Resource Centre at the heart of the community.
• A Community engaged with its heritage.
The sustainable future of Sarah Brisco House and its heritage assets is dependent on its continued use and value to the public.
The project will therefore aim to engage and provide a wide range of benefits to a number of specific audiences. The main audiences have been identified and described below,and finally there is a summary of how we intend to overcome barriers and engage these groups with the heritage.

Local Residents
The project will engage local residents with theirlocal heritage through the Museum and activities held in the building,museum and surrounding area by the volunteers and Community Heritage Officer.It will be a learning opportunity, and a new attraction (museum) for local families.
They will also benefit further as the project will ensure that the Town Council's Civic services are accessible and stay in the town centre and provide scope for providing additional services and activities for local people. It will play a part in the wider town centre regeneration effort by retaining the heritage and

attractiveness of the significant building (also of benefit to businesses).

Young People & Schools
We will engage youth by providing a modern & accessible educational facility that combines the museum with a multimedia reading/education room. We've engaged with local schools and they have identified the potential benefit to pupils from learning about the local heritage and also about how local democracy works in the Town Council.

Elderly and Less Abled
The project will provide access for all to all public spaces and facilities within the building. There will also be volunteering opportunities, and heritage events and activities for people to socialise. They are also the group most likely to benefit from keeping the civic services within the Town Centre for accessibility.

Local Businesses and Entrepreneurs
This group will benefit through the project creating new workspaces for small local businesses and/or entrepreneurs in the town centre at an affordable rent and also potentially hotdesking facilities. Meeting and conference facilities will be available to rent and surrounding businesses will benefit from increased footfall from the Museum,event participants, and centrally based employees (new desk space).
The local businesses & entrepreneurs finding a home at Sarah Brisco House will be immediately engaged with the heritage through their surroundings and having access and information to/from the museum, events, volunteers, and the project staff. The wider businesses will be engaged by the newly appointed Community Heritage Officer, who will engage them with the heritage and also the benefits of capitalising on our local heritage to attract more business and customers.

The Robert Owen Museum Volunteers
They will benefit by enabling them to develop their skills and knowledge, providing additional opportunities, and have a modern museum to engage with locals and visitors alike. The current group are already engaged with the heritage, the challenge will be to attract new volunteers to join them and the Community Heritage Officer will play a key role in this.

Visitors / Tourist
Visitors will benefit mainly from the newly developed Museum, which will be designed specifically to engage them with the local heritage, aided by the museum volunteers.
During the Development phase we want to identify new opportunities and partnerships to engage groups traditionally under-represented in projects like this who can benefit.

Overcoming Barriers

Barriers to engagement in similar projects are often identified as transport and cost. To overcome these we will endeavour to offer free access to most activities and also to the museum (we currently only collect voluntary donations), and also provide a budget for travel costs / transport options for project events and activities.
Two other linked barriers are:
a) lack of awareness of the heritage
b) lack of awareness of the benefit it can provide.

This project will overcome this with a big publicity effort and promotion in the media, online, schools, local groups, communal events etc.
The benefit of a multipurpose facility like this is that new audiences will encounter heritage when they engage with civic services and businesses in the building.
Physical barriers will be addressed through improving accessibility through altering the layout, providing facilities, and installing a lift. Provision will be made for the hard of hearing and visually impaired. We would also like to include a budget for providing transport to individuals to events and activities, potentially through a local taxi firm.
Everything will be bilingual, with potential provision for additional languages to engage foreign visitors.

Does heritage attract visitors?
Yes

Number of visitor received last FY
800

Number expected per year after project
4,000

Delivered by partnership?
☑

Delivery partner details
Newtown and Llanllwchaiarn Town Council is submitting this application on behalf of a partnership. This partnership includes two other organisations who we have been collaborating with since we began exploring the potential for transforming Sarah Brisco House back in 2019. These partners are:

• The Sarah Brisco Trust (Owners of the Building)
• The Robert Owen Museum

Details of both are included below.

The Sarah Brisco Trust [for Newtown and Llanllwchaiarn]

The building is currently owned and managed by 'The Sarah Brisco Trust for Newtown and Llanllwchaiarn'. A registered charity, their charitable objective is "the provision and maintenance of a Museum of Robert Owen artifacts and a reading room for the benefit and use of the inhabitants of the Town of Newtown & Llanllwchaiarn and the surrounding area." It's important to note that the Trust has a duty to provide both a 'Museum' and a 'Reading Room' for local residents, and these must be incorporated into its plans for the future.

In furtherance of the purpose, the Trust has powers to provide educational facilities or material at the reading room and museum; to prepare, print, produce, publish and circular free promotional material relating to items exhibited; to obtain funds; to do any other thing that furthers the purpose.

The building is owned by the Trust and is leased to the Newtown & Llanllwchaiarn Town Council until November 2078.

Ed Humphreys is the main contact for this work, and as the Clerk for the Sarah Brisco Trust (he is also the Clerk for the Town Council) he supports the Transformation Team. Ed currently coordinates all the work and manages external contractors; however this role is voluntary and unpaid, and the new role will take some of the pressure off him.

Ed Humphreys contact details: sarahbriscotrust@gmail.com

The Robert Owen Memorial Museum

The Robert Owen (Memorial) Museum is a registered charity and limited company, dedicated to maintaining a museum chronicling to the life and work of Robert Owen. (1771-1858). It relies on visitor donations, the work of our volunteers, and awards from grant funding bodies. They have a board of trustees that acts as the decision making body, which meets quarterly. The every-day running of the museum is monitored by the trustees, but delegated to a group of volunteer officers who have specific roles within the Museum.

Norman Davies Contact Details: normcdavies.14@gmail.com

Working in Partnership
The Sarah Brisco House Transformation Team
We have established a joint Project Team that has worked together since the beginning of this project development work in 2019. This is the Sarah Brisco House Transformation Team, and it includes representatives from the three main partners. When the project starts, this team will be the project board that manages the project on behalf of the partners. The members of the board are as follows:

From the Sarah Brisco Trust:
- Mr Rod Evans (SBT Chair)
- Mr Bob Wright
- Mr Martin Doyle

From the Town Council:
- Cllr Mike Childs
- Cllr Peter Lewington
- Cllr Rupert Taylor

From the Robert Owen Museum
- Mr Rex Shayler (ROM Chair)
- Supported by Mr Norman Davies

Their role as representatives of the three main partners who have led and jointly funded the work to date is to oversee progress, decide on the direction of the work, and instruct the Clerk. This group oversaw the delivery of the previous AHF funded Viability Study in 2022. Short biographies for all have been attached with this application, along with a draft partnership agreement.

Environmental impact

Our intention is to make the building as environmentally friendly as possible, both during and after the transformation project. We also want to promote this approach to locals and visitors alike, as well as promoting the local natural heritage. Below are the main measure that we've identified to help us achieve this:

The brief for the capital works will require all applicant contractors to state their sustainability credentials and incorporate sustainable methods and processes in their work. This will likely include ensuring that appropriate traditional construction methods and materials are used during the capital works to the building, measures to reduce C02 emissions during construction, re-using and/or recycling materials used or recovered etc. We will seek advice on how best to incorporate these in the tender, taking advice from suitably qualified professionals.

We are also considering the ongoing long-term sustainable use of the building during the next decades (and hopefully centuries) of operation. The main measures we've identified at this stage to secure this sustainable legacy are as follows:

• Improving the energy efficiency of the building by making repairs and/or improvements to the building's

envelope.
• Ensuring that the windows and doors are efficient in retaining heat.
• Improving the insulation of the building to retain heat (and keep it cooler in the summer).
• Introduce measures to enable tenants and users to reduce their carbon footprint through e.g. grey water capture and use for public conveniences to reduce water use, recycling and composting facilities for waste produced on site, and the potential to use green energy sources.

We will explore the potential for incorporating green energy (or water heating) installations such as air source heat pumps and/or solar panels into the building. Presently it seems like solar or water heating panels on the 'hidden' roof sections would be most appropriate for the listed building.

We will explore ways to make our learning and successes in incorporating environmentally friendly measures into a Grade II Listed Building in a Conservation Area available to similar projects on historic buildings and in urban Conservation Areas.

We will also promote these measures and our efforts in a dedicated section of the new museum focused on the historic building itself, to promote and inspire visitors and locals alike that they can also make a difference.

Our project is focused on delivering accessible activities and services, both heritage and civic, in the heart of the community, in Newtown Town Centre. Negating the need for the town's residents to travel elsewhere. It's also easily accessible by regional bus routes and within a short walk from the Train Station for residents of the wider community and visitors from further afield, so the project should cut down on mileage and emissions to those accessing the local services.

The disturbance to roof spaces should be minimal according to our plans and no protected or vulnerable species have been identified in the building. However all minor works and/or repairs will be done in collaboration with experts to ensure any potentially discovered species such as nesting swifts or bats are not disturbed. This usually involves monitoring any identified species, planning seasonal construction works, and/or installing mitigating measures such as nesting boxes.

Our plan is to promote the local natural heritage and landscape in the museum alongside the history or Robert Owen and the wider local heritage and culture. This information will also be included online.

How will you to acknowledge your grant?

If successful we will do whatever is needed to promote and thank NLHF, as without your support this project would not be possible. Robert Owen is a nationally important figure, and we will utilise this to get as much publicity as possible; local, regional and national.

Having spoken to other projects and read the online guidance, we propose to acknowledge the grant in the following ways. And we will review and develop this with the NLHF officers as the project progresses to ensure that the approach is still fit for purpose:

- During the capital works we will install information boards around the building and Newtown Town Centre to acknowledge the support of the NLHF (and other funders) and thanking them for making this possible. It will be visible to the entire community and all visitors and passers-by.
- We will install permanent plaque(s) at certain locations to be agreed with NLHF (e.g. entrance, museum entrance etc) to note the support of the NLHF. We'll also position the 'Made Possible' stamp at strategic locations around the site.
- We'll install an information board in the museum capturing the work of developing Sarah Brisco House, ensuring that the NLHF and other funders are given explicit recognition for their roles, as well as including the logos etc. This would be a key part of interpreting the heritage of the site and displayed in a prominent and accessible location.
- All press releases and tv / radio items will reference the support of NLHF.
- We'll publicise the support of NLHF through our partners' social media channels, both with specific posts and as part of other updates and news.
- We will host a dedicated page on the website to capture the impact of the NLHF's contribution, and thank you for the investment.
- All promotional materials, leaflets etc related to the project will include the NLHF logo (or 'made possible' logo).
- Flags and banners will be prepared and displayed at on-site events and activities for the duration of the project. These events will be outlined in the Activity Plan worked up during the Development Stage.
- All project events and activities will include verbal acknowledgement and thanks from the lead / organiser for the support of the NLHF.
- The contribution of the NLHF will be promoted and celebrated in community newsletters and bulletins
- We'll hold at least one significant public event with the NLHF as main 'Sponsor,' specifically to celebrate the support of the NLHF. This could be to celebrate receiving support at the beginning of the project to raise awareness, or at the end of the capital works to celebrate the finished facility (or potentially, both!!)
- We could potentially look at discounted event tickets for National Lottery Players, but we would need to work on the practicality of this with the NLHF officers, and learn how other projects have done it as we currently try and provide the facilities for free to all.

The heritage

Heritage in your project and importance

There are two main ‘types’ of heritage encompassed in our project, outlined here with an explanation of why it’s important and to who.
The Architectural Heritage
An impressive Grade II listed timber framed building located on the corner of Broad St and Severn St it’s one of the most significant buildings in Newtown town centre.Alongside the Victorian Clock Tower it’s the iconic centrepiece of the townscape.
SBH is an unique building architecturally.With the two main funders disagreeing on its design the architect Frank Shayler hit upon the novel idea of incorporating the two different styles developed by Richard Norman Shaw;Queen Anne & Arts and Crafts.
This architecture is important to the whole community as it embodies the town’s heritage and is a key part of the distinct ‘sense of place’ in Newtown.It’s also important regionally as it draws visitors as part of the heritage townscape and is a visual connection to the rich heritage of Newtown.
The Historic and Cultural Heritage
The unique history of the building itself-the reason it was built-is testament to an important chapter in our Nation’s history.
SBH has immense social and cultural heritage value both locally and internationally as it was erected in 1903 as a memorial to the renowned social reformer and founder of the co-operative movement Robert Owen, born on Broad Street and buried in the nearby Church.
Financed jointly by public subscription and the Co-Operative Union the site was gifted by Mrs Frances Arbuthnot-Brisco carrying out the wishes of her late aunt Sarah Brisco of Newtown Hall.Originally built as a free public library giving local residents access to books and newspapers regardless of their wealth it still hosts a reading room to this day.
The building itself is an iconic & visible connection to Newtown’s rich Industrial heritage. As well as Robert Owen,Newtown was the location of the first mail-order retail business (19th century entrepreneur Pryce Jones) and location of the first Chartist demonstration in Wales-1838.
Since 1983 The Robert Owen Museum has been located on the ground floor, relocated from the ‘Midland Bank’ building (where Robert Owen was born) where it was established in 1922. It’s the only museum in Wales dedicated to the globally renowned and significant figure in our nation’s history. A source of knowledge of our rich past it has a key role in interpreting and telling Robert Owen’s story and showcasing the role he played to both our local communities, visitors, and to the next generations.Compared to the New Lanark World Heritage Site in Scotland the current Museum doesn’t do justice to his legacy and the impact he and the cooperative movement had on the world we live in today.

The Heritage’s significance to people
The historic structure and the rich heritage that is commemorated and interpreted here is part of the cultural fabric of our community and we believe that it’s vital that this is preserved and passed on to future generations.
It is a key element of Newtown’s ‘sense of place,’ is a source of immense local pride. Public consultation leading to the Place Plan identified Sarah Brisco House as one of the buildings or structures of significance to the local community.
The Museum, even in its current dated condition, is an important educational facility for local schools and communities, and a potential prime visitor attraction for the town.
It also has an important role to play as a focal point for the future development of the town centre, as evidenced by the key role Sarah Brisco House has in achieving the aims of the Newtown and Llanllwchaiarn Place Plan. Specific projects include:
• Develop projects relating to the 4 local pioneers: Laura Ashley, Robert Owen, David Davies and Pryce Pryce-Jones…including “A permanent exhibition plus permanent object and archive store in Newtown.”
• …implement solutions to key empty/run-down buildings:
• Develop more all-weather attractions, particularly those that make use of existing buildings.
In the Place Plan the evidence collected through public consultation (page 36) notes that:
• 66% agreed that Newtown has a unique heritage.
• Only 29.2% were satisfied that aspects, features and historic buildings are looked after and will be preserved.
• The Conservation Areas of Penygloddfa and the Town Centre are important assets for the town
It also highlights that three of the four popular themes were:
• Conservation & development of key areas and buildings.
• Promote and educate people of our history, archaeology and heritage.
• Improve and do more with the neglected important buildings.
And ideas for the future included:
• Celebrate towns industrial heritage
• Better promotion of the Robert Owen, WHSmith and Textiles museums
• Preservation of the conservation’s areas
We consider it important to keep the civic centre in the town centre and realise the potential to develop a fully accessible community heritage & resource centre at the heart of the community.

At risk?



Details of heritage risk

The future of the building is dependent on its continued use and value to the public, however current arrangements are both financially and operationally unsustainable in the long run. The future of the historic heritage building itself will be threatened if the building is abandoned as it will quickly deteriorate into ruin, which poses a significant risk to the current civic and heritage services provided to the local community which currently include all Town Council Services, the Robert Owen Museum, a Reading Room, and Menter Iaith Maldwyn. The loss of an iconic piece of our built heritage would be compounded

by the negative effect on the Town centre.

The current business model relies heavily on the Town Council. They provide rental income as tenants, but more significantly they are responsible for the maintenance of the building under the term of their lease. The presence of their staff is also key to enable the building (including Museum and Reading Room) to be open to the public during the week. However, the building is currently not fit for their purpose as it doesn't meet the criteria set out in the equalities act with regards to accessibility. Public access to council meetings isn't possible, and the shared office space is less than ideal. If they are forced to move out, it's difficult to see a viable future for the building.

The Museum is dated and not fit for purpose. Volunteer led Robert Owen Museum has neither the funds nor capacity to upgrade it on their own. And they find it impossible to attract new and younger volunteers because of the poor condition and quality of the museum. So it's a vicious circle that threatens what should be one of the crown jewels of Heritage Museums in mid Wales. The first museum to Robert Owen was established in 1922 before it relocated to Sarah Brisco House, without support it's difficult to see it surviving until the end of the decade due to declining volunteer numbers and an increasingly dated offer to visitors and educational groups.

A complex layout which includes off-set floors leads to poorly utilised space, which is a major barrier to developing the museum and other facilities which would provide additional community services an new income streams which could be reinvested n maintaining and developing the current heritage facilities.

Like most old buildings, the energy and maintenance costs are very high and have skyrocketed in recent years. The Town Council are currently absorbing these costs, but without them it would cripple the Sarah Brisco Trust and Robert Owen Museum, forcing the building and the museum to close.

If key stakeholders are forced to relocate and/or the building deteriorates further and needs urgent repairs, they will lack the resources to undertake the work and the long-term future of the building will be at risk. Funding for such projects in the third sector is also getting much more competitive, and if we don't secure it soon there's a risk that we will miss the opportunity completely.
If your project involves a building or a monument, tell us if it is on the buildings or monuments at risk register.

Because the Town Council's current lease makes them responsible for maintaining the building, it's currently structurally in good condition so not considered at immediate structural risk. Remedial works were carried out in the recent past following from the external Condition Survey Report by McCartneys Planning & Survey from 2019) and an earlier internal Condition Survey Report by Bowen Consultants Ltd from 2016.

However if the building is vacated it will soon fall into disrepair and it's difficult to see a future that preserves and promotes all aspects of the current heritage asset.

NOTE: For the question below we can't select the option from the list - so we confirm it's a Grade II Listed Building wih a museum.

Will project involve capital works?

☑

Capital work details

The building
The capital works on this project will all be focused on Sarah Brisco House, which is owned by the Sarah Brisco Trust and currently let on a long-term lease to the Town Council which runs until November 2078. The intention is to update and further extend this lease to reflect the new and improved facilities developed through this project:

Sarah Brisco House,
The Cross, Broad Street,
Newtown,
Powys, SY162BB

Statutory Permissions or Licences
Sarah Brisco House is a Grade II Listed Building, listed in 1988 for its group value and its "special architectural interest as an exceptionally fine early C20 building in an accomplished arts and crafts idiom, expressively composed and exquisitely detailed. Historical association with Robert Owen, celebrated as a socialist, educationalist and workplace reformer." (CADW Listed Building Records).
A Pre-App Built Heritage enquiry was submitted to Powys County Council (PCC). The response followed a site visit by Dr Sam Johnson, the Built Heritage Conservation Officer, considered our proposal and concluded that they are feasible with no aspect ruled out.
According to Mr Johnson it is unlikely that any 'change of use' planning application would be required for the proposed development.
However the response notes the need for Listed Building Consent, accompanied by a Heritage Impact Assessment. CADW and other national amenity societies would be consulted through this process at this stage as advised.
We also submitted a pre-app building control enquiry to PCC, however the reply from Planner Luke Woosnam indicated they had very little to add to the built heritage advice and kindly provided a refund on the enquiry.

These consents are not in place, and our intention would be to secure them during the development stage.

The Proposed Capital Works

Our proposal option makes the most of the existing space to support uses that provide social, economic, and wellbeing benefits to the area.

It would see an expanded and modernised, wheelchair accessible museum dedicated to Robert Owen occupying most of the ground floor (112m2), potentially also incorporating the wider heritage and landscape of the area.

The currently disused courtyard area would be transformed into either a) an appropriate retail unit b) a communal space, and act as a Gateway to the Museum. New disabled toilets would also be installed to benefit all Town Centre visitors.

On the first floor, the Council Chamber would be transformed into a flexible multi-functional space that the community and local organisations could hire. A need identified in the Place Plan. It would also serve as the required Reading Room, an educational room to facilitate museum visits by groups and schools. These facilities will be accessible to all through the installation of a new lift.

Current office space will be retained on the second floor (36m2), offering a Town Centre location for small local businesses to locate, and remote workstations for daily hire.

By rationalising the office space currently used by the Town Council, decreasing overall office space and storage will actually lead to additional opportunities through more flexible space and an additional unit in the courtyard (See supporting documents for detailed floorplans).

Works Necessary

This option requires developing a new main entrance through the existing Gateway to the Courtyard, to facilitate wheelchair access. The museum space will need to be reconfigured (partition walls removed etc) and a professional organisation commissioned to design and create modern and interactive exhibits and displays to create a quality visitor attraction and educational resource.
Disabled toilets will need to be built on the ground floor, and a lift installed next to the main stairwell. The courtyard (currently storage) will be redeveloped into a new welcoming retail unit / communal space.
Current office spaces and storage will be reconfigured to provide a more appealing space for local businesses, and the main Council chamber will be modernised to provide a flexible and networked multi-use space.

Impact

The refurbishment will bring back into use approximately 40m2 of currently unused office space in the town centre (1st floor & landing), which is expected to benefit local microbusinesses, start-ups, and freelancers working remotely.
The transformation of the council chamber will create 61m2 of new and accessible multimedia conferencing space for use of any business or enterprise working in the area. And if events are held there, it will bring people into the town.
The re-development of the courtyard will also create 35m2 of unique retail space, although there needs to be care taken to avid displacement of current business (for this reason the original plans for a community café have been shelved).

Capital work owner

Project Partner

More information on owner

The building is currently owned (freehold) and managed by the ‘The Sarah Brisco Trust for Newtown and Llanllwchaiarn’.

The trust was set up in 1995 and registered with the Charity Commission in 1998 to take the property in trust for the benefit of the community, as the previous ownership status was unclear (See Timeline below for details). Their charitable objective is “the provision and maintenance of a Museum of Robert Owen artifacts and a reading room for the benefit and use of the inhabitants of the Town of Newtown & Llanllwchaiarn and the surrounding area.”

In furtherance of the purpose, the Trust has powers to provide educational facilities or material at the reading room and museum; to prepare, print, produce, publish and circular free promotional material relating to items exhibited; to obtain funds; to do any other thing that furthers the purpose.

Due to the historical complexities, the ownership of the building wasn’t fully confirmed until 2021 when the Sarah Brisco Trust were finally able to register ownership of the building with HM Land Registry. Now that this is in place we are able to undertake the transformation work that is desperately needed to secure the future of the building.

Currently the building is let entirely to the town council which on a long-term lease which runs until November 2078. The intention is to update and further extend this lease to reflect the new and improved

facilities developed through this project.

The ground floor is sub-let to the Robert Owen Museum at a peppercorn rate. The Museum own and manage all the current historic artifacts and exhibitions in the museum.

Loans
As a Town Council we can control the cashflow for the development phase so no loans will be necessary. We will explore the potential need for any 'bridging loans' that could be required during the capital build in the Delivery Stage, specifically to cover any lag between paying out large invoices and claiming the retrospective grant. The WCVA have a loan facility that similar projects are utilising for similar projects so this will be our first option should it be needed.

BUILDING OWNERSHIP TIMELINE

1898: Sarah Brisco left in her will the land at the Cross to Newtown & Llanllwchaiarn Urban District Council (UDC) to be used as a free library.
1902: Monies left over from the new tomb to Robert Owen were also donated to the building (a substantial amount - £1200 of the £3000 cost)
1903: Free library opened in 1903 with UDC offices upstairs
1922: Robert Owen Museum opens in Midland Bank - (opposite Sarah Brisco House) – site where Robert Owen was born.
1970's: Newtown UDC disbanded and Powys County Council took over the library. The Museum was asked to quit the Bank premises. The Town Council had no offices. Powys County Council builds a new library and moves out.
1983: The Town Council moved back in and allowed the Robert Owen Museum to reopen on the ground floor (1983).
1990's: Ownership was unclear and auditors point out that Town Council had no jurisdiction, so the Sarah Brisco Trust was set up to take the property in trust for the benefit of the community.
11/07/1995: Sarah Brisco Trust (SBT) scheme was sealed with the Charity Commission
11/09/1998: SBT entered onto the Register of Charities
2021: The SBT registered ownership OF THE BUILDING with HM Land Registry

Any legal conditions or restrictions? ✓

Details of conditions or restrictions

Sarah Brisco House is a Grade II Listed Building, listed in 1988 for its group value and its "special architectural interest as an exceptionally fine early C20 building in an accomplished arts and crafts idiom, expressively composed and exquisitely detailed. Historical association with Robert Owen, celebrated as a socialist, educationalist and workplace reformer." (CADW Listed Building Records).

A Pre-App Built Heritage enquiry was submitted to Powys County Council (PCC). The response followed a site visit by Dr Sam Johnson, the Built Heritage Conservation Officer, considered our proposal and concluded that they are feasible with no aspect ruled out.

According to a Pre-App Built Heritage enquiry, it is unlikely that any 'change of use' planning application would be required for the proposed development.

However the response notes the need for Listed Building Consent, accompanied by a Heritage Impact Assessment. CADW and other national amenity societies would be consulted through this process at this stage as advised.

We also submitted a pre-app building control enquiry to PCC, however the reply from Planner Luke Woosnam indicated they had very little to add to the built heritage advice and kindly provided a refund on the enquiry.

These consents are not in place, and our intention would be to secure them during the development stage.

It's important to note that the Trust has a duty to provide both a 'Museum' and a 'Reading Room' for local residents, and these must be incorporated into its plans for the future.

Condition survey in the last 5 years? ✓

Does the project involve an acquisition? No

Heritage designation

Heritage formal designation?

Grade I or A buildings 0

Grade II* or B buildings 0

Grade II or C buildings	1
Local list	0
Scheduled ancient monument	0
Registered historic ship certificate no	0
Grade I listed park or garden	0
Grade II* listed park or garden	0
Grade II listed park or garden	8028 / 8029
Other formal designation	

Managing your project

Project of this scale in the last 5 yrs? ✓

Details - previous project of this scale

Over the past 5 years the Town Council have managed and delivered the following projects andworks:
• Application and management of grant funds for Covid Reconstruction Repair and Re-use Activities in Welsh Town Centres for Circular Economy Mid Wales Reuse and Repair 'Waste Not' Shop: £550,050 Capital and £125,500 Revenue; a national Ystadau Cymru innovation award winning project
• Transfer of Land from Primary Authority: three way piece of work between County Council, Town Council and Going Green for a Living Land Trust (trading as Open Newtown); a senior member of staff seconded to help write and successfully obtain a grant of £1,100,000 that went on to help form a Community Interest Company Going Green fir a Living Land Trust (trading as Open Newtown) whilst also investing in new facilities such as a premier play park, and BMX pump track that are operate by the town council Setting up and manage a Service Level Agreement for grounds maintenance with Open Newtown: value £60,000 pa
• Community Asset Transfer of Public Toilets from County Council to Town Council
• Tender, procurement and implementation of 3-year contract for cleaning public toilets to the value £28,485 in year 1
• Tender, procurement, and implementation of a Destination Playpark in Town Centre to value £150,000; financed by borrowing £87,000
• Tender, procurement, and implementation of a multi-use games area (MUGA) next to the town playpark for a value of £45,000
• Growing Newtown, Green infrastructure project on High Street: the town council was invited to bid for £500,000 from Welsh Government via the county council as Newtown was identified as a 'can do' town that had already demonstrated its ability to apply for grants and see the projects through (whilst working with others if required) to completion. The town council continues to maintain these areas developed under this project.
• Annual Food Festival Infrastructure: to procure and manage the supply of infrastructure to the budget value £31,000
• Annual Christmas Festival: to procure and manage the annual festival the budget value £9,500
• Town Branding: Tender, procurement, and project in progress to build a unique brand for Newtown; value £32,000
• Canopy cover space in Town Park: having identified funds that had become available, applied for and implemented a permanent canopy for members of the public to use to enjoy the outdoors in all weather
• A county council local places for nature initiative: identified a space along the only owned roadside verge to asset transfer, set up and plant a swath of bee friendly plants and flowers with an interpretation board. This area continues to be manged by town council and has been said to be the best-looking roadside verge in the town.

Why this project?

As a Town Council we have been based in the building, along with the Robert Owen Museum, since 1983. We are long-term tenants of the building owners, the Sarah Brisco Trust, with a current lease that expires in November 2078.
We host the Robert Owen Museum on the ground floor for a peppercorn rent, and under the terms of our lease we are responsible for the maintenance and running costs of Sarah Brisco House. This setup illustrates our steadfast and unwavering commitment to both the Grade II Listed Building and all aspects of its rich heritage.
We have been working in partnership with the Sarah Brisco Trust and the Robert Owen Museum since 2019 to try and secure a viable future for the heritage building. To achieve this the 'Transformation Project Team' was established in 2019 made up of representatives of all three organisations to develop the vision and plans for the heritage building and deliver them.
There are a number of reasons why we as a Town Council are best positioned to lead this work:
• We have experience of successfully leading and delivering large, medium, and small scale projects, most recently the development of the 'Waste Not' store across the road, which sell preloved goods at fair prices, working to improve the environment by reducing waste.

• We have experience of managing external contractors through projects and the ongoing activities of the Town Council.
• We have the capacity to manage the cashflow for the project using our reserves, and the credibility (if required) to secure any bridging loans that might potentially be required during the capital works.
• We have well established governance and management procedures and systems to manage and employ staff.
• We have a robust governance and audit and accountability framework, including the key policies and safeguards expected of any public authority.
The Transformation of Sarah Brisco House is also key to delivering a number of aims in the Newtown and Llanllwchaiarn Place Plan. This significant body of work, based on two years of public consultation and engagement between 2019 and 2020, was led by The Town Council. 'Character and Heritage' is a specific chapter, focusing on addressing key themes that include:
• Conservation & development of key areas and buildings
• Promote and educate people of our history, archaeology and heritage.
• Improve and do more with the neglected important buildings.
Other element of the plan relate to Community Facilities, Business, Learning & Employment, Health & Wellbeing, Town Centre Experience, and Tourism, Culture & Attractions.
This is a 15 year plan that will guide our efforts between 2021 – 2036, and delivering The Sarah Brisco House Transformation Project enable us to realise key aspects of this community led vision.
What other strategies have been considered?
The original intention was that the Sarah Brisco House Trust, as owners of the building, would be the lead partner. The trust was set up in 1995 and registered with the Charity Commission in 1998 to take the property in trust for the benefit of the community, as the previous ownership status was unclear due to historical reasons outlined in the previous section.
The Sarah Brisco Trust were the lead partner on the original EOI for this project. However as we've progressed the plans and this application it's become apparent that as a small voluntary organisation with no experience of delivering major projects, the risk would be too great for them to lead on this work.
The Transformation Project Team therefore approached us to ask us to be lead partner, and on July 24th, 2023, the Full Council voted unanimously to take on this role going forward.
What will you do if the project does not go ahead?
If this project does not go ahead, it is almost inevitable that we as a Town Council will be forced to find new premises as the current building does not meet the criteria set out in the equalities act with regards to accessibility. Public access to council meetings isn't possible, and the main offices and the Council Chamber are not accessible for all.
As a council it would mean relocating our civic services to a less accessible location outside the Town Centre and abandoning one of the most significant heritage buildings in the country to its fate.
This is no exaggeration. If we have to vacate the building, there will be no rental income for the Sarah Brisco Trust to reinvest in the heritage asset, and they will also become liable for the energy and maintenance costs. Given that the only space of major commercial value is taken up by the Museum, it's unlikely there will be a viable future for the building that maintains and safeguards its significant and unique heritage assets.
This would lead to the significant loss of an iconic element of our townscape, and one of the County's key heritage and educational attractions.

Details of capacity building activities

As a Town Council we are lucky to have established tried and tested financial controls and line management frameworks that are robust and up to date. However, as the project develops, and the requirements of the project evolves and introduces new challenges, it would be beneficial to review these structures that relate to the project to make sure that they continue to be fit for purpose.

We don't have the capacity to manage this project using existing staff, which means that we will need to employ a Project Coordinator / Manager for the duration of the project. Their role will be to manage the delivery of the capital work, the cashflow, and manage the delivery of the community activities and development of the heritage offer.

We also wish to employ a Community Heritage/Engagement Officer during the delivery stage. Their main role will be:

• To engage with the community and drive public engagement with heritage.
• To manage and develop the capacity of the Robert Owen Museum volunteers, developing the group in skills and numbers to be able to manage the new modern museum once the NLHF project is finished.
• To drive engagement and develop links with schools, collages, community groups, and other organisations across the county. Establishing long-term ongoing relationships.
• Arrange and deliver the heritage activities and events.

As councillors and existing staff, we have the capacity to contribute and support, but not to lead on these additional activities.

Depending on their skills and experience, these new staff will require training to address their weaknesses and/or build on their strengths. This is likely to include heritage specific training, project management, finance training, and perhaps digital activities.

Given the different requirement of the Project Manager/Coordinator between the Development & Delivery Phase, but the benefits (as recognised by other NLHF projects) of having continuity in the role if possible, it would be beneficial to develop the individual's skills during the Development Stage to prepare and equip them for the Delivery Stage.

We will need to develop the Business Plan for the Building, and this is seen as a piece of work to be undertaken during the development phase to reflect the planned changes, and updated again during delivery and ongoing thereafter to respond to new learning and experience.

We would also want to develop the capacity / skills of certain existing Town Council staff to ensure that the same skills are retained by several individuals. This will safeguard against any staff turnover so that the loss of an individual does not strip the whole organisation of the capacity, and also prepare us for when the paid project posts come to an end. The aim is to increase our resilience and provide long-term security for the building and the Museum. The same is true of the Trustees of the Sarah Brisco Trust and Robert Owen Museum.

The Robert Owen Museum Volunteers (including new recruits) are also likely to require training. This could be related to heritage, but it's also likely it will include things like health and safety, DBS checks to work with youngsters and vulnerable groups, first aid etc.

It’s unlikely that we will conduct a governance review of the organisation as we have strict protocols and procedures in place due to being a Town Council. However we keep thing under ongoing review and it’s possible that changes could be made to ensure the smooth delivery of this project.

The Governance of the project itself will be kept under continuous ongoing review. The formal Partnership Agreement between the three partners for example is a relatively new development developed specifically for the requirements of this project. We anticipate that project governance will need to be refined during the development stage as roles and requirements become better defined, and then reviewed periodically thereafter.

Finally the management of a NLHF project will be a new experience for us as a partnership, and opportunities for support in familiarising staff and volunteers with ne NLHF processes will be explored, including learning from other similar NLHF projects.

Details of any jobs or apprenticeships

The project will create two new jobs specifically to deliver the project.

Project Manager / Coordinator (Full Time)

During the Development Phase the responsibilities of the role will include:

- Working with the Transformation Project Board to fully develop all aspects of the project.
- Engage with the communities of Newtown and surrounding area to ensure they are included at all stages.
- Collaborate with support organisation and statutory authorities to ensure best practice is followed and all permissions and licences are secured.
- Develop new partnerships with delivery & potential user organisations to enable us to engage and work with more diverse audiences, especially those that are under-represented in these kinds of projects and could gain significant benefits from being included.
- Liaise with the architects to ensure project activities and capital works to develop facilities align.
- Prepare the Stage 2 application to NLHF and prepare supporting documents, briefs, job descriptions etc.
- Commission all necessary pieces of work e.g. Activity Plan, Evaluation Contract, etc
- Work with the finance officer to prepare the updated and detailed financial breakdown.
- Secure any required match funding.
- Maintain an up-to-date risk register.
- Prepare regular progress reports.

During Delivery Stage

- Manage the delivery of all aspects of the project.
- Manage the finances and project budget.
- Prepare legacy plan.
- Line management for Community Heritage / Engagement Officer.
- Engage with the community to ensure they are included at all stages.
- Collaborate with support organisation and statutory authorities to ensure best practice is followed and all permissions and licences are secured.
- Liaise with the architects to ensure project activities and capital works to develop facilities align.
- Commission all necessary pieces of work e.g. Development of heritage Interpretation Materials.
- Maintain an up to date risk register.
- Prepare regular progress reports.

We would hope to have the same individual in post for both phases of the work, but understand that there will be a gap in between which might prove challenging unless we can cover the wages ourselves during this bridging period.

Community Heritage Officer

This role would only be during the Delivery Phase and is expected to be full time. The role will be further developed during the Development Phase alongside the activity plan, however the main responsibilities

are expected to be:

- To engage with the community and drive public engagement with heritage.
- To manage and develop the capacity of the Robert Owen Museum volunteers, developing the group in skills and numbers to be able to manage the new modern museum once the NLHF project is finished.
- To drive engagement and develop links with schools, collages, community groups, and other organisations across the county. Establishing long-term ongoing relationships.
- Arrange and deliver the heritage activities and events.
- Create and manage new partnerships with local organisations and user groups
- Targeted engagement with less engaged groups and communities

Our intention is that these opportunities are openly advertised. At present we have no plans to move an existing member of staff into any role either in the development or delivery phases.

Apprenticeships

Currently we have no plans to offer an apprenticeship. However this option is something we'd like to explore during the Development Stage in collaboration with a local education provider, specifically supporting the Museum with heritage interpretation and engaging visitors.

Development phase

Work during development phase

The following elements are (or will be) already in place by the beginning of the Development Phase through work already undertaken:

- Building Condition and structural Surveys
- Outline Costed Plans
- Viability / Feasibility Study with Options Appraisal
- Outline Business Plan

During the Development Phase we will:

- Employ a Project Manager and provide any required training for the individual.
- Undertake further community consultation and dialogue to ensure project meets changing needs and opportunities.
- Commission an Architect and QS to develop detailed plans up to RIBA Stage 3
- Apply for Listed Building Consent,
- Undertake a Heritage Impact Assessment
- Commission Project evaluators to work with us through the development and (hopefully!) delivery stage to ensure continuity of support.
- Commission a detailed and costed Activity Plan, including further audience development work.
- Draft Conservation Plan
- Commission an interpretation plan by a consultant, working with the Robert Owen Museum volunteers and key stakeholders, and engaging the wider community, schools, heritage groups etc. This work will inform the development of the new Robert Owen Museum exhibitions and include physical and digital materials.
- Develop detailed and SMART project outcomes & objectives.
- Prepare all delivery stage briefs and job descriptions.
- Undertake a project Governance Review
- Develop a detailed Business Plan for Sarah Brisco House
- Develop working relationships and collaborative activities with partner organisations and potential user groups.
- Identify capacity building and training needs – and outline in a costed training plan.
- Update capital cost estimates
- Update project Governance and Management frameworks to accommodate new expanded scope and range of activities, along with new project staff.
- Secure partnership / match funding
- Develop detailed timetable, costs, and cashflow for Delivery Phase
- Develop initial legacy Plan to sustain project outcomes beyond the project. To be refined during Delivery Stage as project progresses.
- Work with NLHF officers to further develop ways of acknowledging the grant and rewarding Lottery Players.

We intend to explore how the Welsh language can be given more prominence in both heritage interpretation and activities going forward.

Tell us how you will produce all of the supporting documents required with your delivery phase application.

The Project Manager will be responsible for producing and/or presenting the following:

• Timetable plan or area action plan
• Cash flow
• Income and spending forecasts for five years following project completion

• Project management structure
• Detailed cost breakdown
• Risks for the delivery phase
• Main risks document for after the project is completed
• Calculations of full cost recovery
• Briefs for internally or externally commissioned work
• Job descriptions
• Business plan
• Image
• Updated Partnership Agreement.
• Ownership Documents & Lease.

An Architect & QS will be commissioned to develop:
• Management and maintenance plan
• Design specification.

Experienced Consultants will be commissioned to develop:
• Activity plan or area action plan
• Interpretation plan
• Detailed Business Plan
• Monitoring & Evaluation Framework & Report

Not applicable:
• Flow-chart summarising decision-making for 3rd party grants (if applicable)

Development phase - people responsible

The 'Sarah Brisco House Transformation Project Board' will oversee the project. This board was established in 2019 (originally called the 'Transformation Team') specifically to lead and oversee this project, and consists of representatives of all three partners: Newtown & Llanllwchaiarn Town Council, The Sarah Brisco Trust, and the Robert Owen Museum.

The Board is Chaired by Mr Rob Evans of the Sarah Brisco Trust, and Ed Humphreys acts as Clerk. The board meet regularly at the Council Chamber in Sarah Brisco House, which has video conferencing facilities to enable members, partners, and/or guests to join remotely as required.

The Clerk, Ed Humphreys, will have overall responsibility and accountability for the delivery of the project on behalf of the Board as he is also the Clerk for the Town Council and will be managing the project and project staff on behalf of the Lead Partner.

The Members of the project board are listed below grouped by their partner organisation, and short biographies are attached as supporting documentation:

The Sarah Brisco Trust:
- Mr Rod Evans (Chair of SBT)
- Mr Bob Wright
- Mr Martin Doyle

Newport & Llanllwchaiarn Town Council
- Cllr Mike Childs
- Cllr Peter Lewington
- Cllr Rupert Taylor

The Robert Owen Museum
- Mr Rex Shayler (ROM Chair)
- Mr Norman Davies

Ed Humphreys: Clerk to the Town Council (And Sarah Brisco Trust)
Over 35 years working in public sector administration first in information technology management and then in governance and democratic services. Most recent appointment as Town Clerk and Head of Business at Newtown and Llanllwchaiarn Town Council since 2014, and Clerk to the Council at a local community council since 1996. Currently studying for Honours Degree in Community Governance at De Montfort University Leicester. A Fellow of the Society of Local Council Clerks and also elected by the Wales membership to serve Board of Directors since Jan'2017. Holds PRINC2 project management qualification. Currently also supporting the Sarah Brisco Trust as its Clerk.

Project Manager (To be Recruited)

The day-to-day coordination and undertaking of the Development work will be the responsibility of the Project Manager whose role is outlined in the previous section. They will also be responsible for producing progress reports, managing the budget, managing external consultants, and maintaining an up-to-date risk register.

The Project Manager will report directly to the Clerk with a monthly progress report, who will report to the board. The Project Manager will also be required to attend the management board in person.

Responsible Financial Officer

Financial Oversight will be provided by the Town Council's Finance Officer – Liz Gittings. A charted accountant and Fellow of The Institute of Chartered Accountants in England & Wales (FCA).

Other

Resources for Change have been commissioned by the partnership to support the development work since 2019, and Director Deio Jones has been supporting us along the way. Having previously successfully led a NLHF Landscape Partnership Scheme and supported Menter Ty'n Llan through successful NLHF applications, he will be able to mentor and advise the new Project Manager as they settle into the job and help get things going.

Describe how you will choose the services and goods needed during your development phase.

All goods and services will be procured following current best practice and guidance and the council's financial regulations, and we expect that all briefs (attached as supporting documents) will be subject to an open tender process via Sell2Wales and/or similar platforms. All applications will be evaluated by a subgroup of the main project board, with input from the Town Council's Finance Officer and any other skilled/experienced individual that is deemed necessary to co-opt to ensure a robust and fair process.

Delivery phase

Delivery phase - people responsible

This will be the same as the Development Phase outlined above, with the following additions.

- The role of the Project Manager will evolve to be responsible for the delivery of all aspects of the project, including the capital work and manging all contractors. It's anticipated that the individual will be supported by the experienced board members to help them, especially during the first year.
- The role of Community Heritage Officer will be introduced to Lead on engaging with the community; lead on all the heritage activities and events (Delivering Activity Plan); manage the volunteers and guide their personal development and training; develop the volunteer led themed sub-groups.

Work during delivery phase

During the Delivery Phase of the Project we will develop the Grade II listed building into an accessible, welcoming, viable and vibrant heritage focused community asset thet benefits local communities the Town Centre, and the wider region by:
- Employing a Project Manager, hopefully extending the Development Stage Role to maintain skills and knowledge within the team and ensuring continuity.
- Employing a Community Heritage Officer to manage a programme of heritage events & activities, engage and develop relationships with community partners and user groups, and to develop the volunteer capacity and activities of the Robert Owen Museum volunteers (including recruiting new members.
- Deliver a programme of heritage activities and events to engage new and existing audiences with our local heritage. These will include intergenerational activities, youth led projects, oral histories, and commissioned work.
- Safeguard the heritage features of the building.
- Design and re-develop the ground floor to into a modern interactive and multimedia museum telling the story and legacy of Robert Owen, founder of the Cooperative movement born on Broad St, and also incorporating other aspects of local and regional heritage. This will be a jewel in the crown of Powys in terms of regional museums, giving the platform that an individual of global influence like Robert Owen deserves.
- Transform the current council chamber into a multimedia conference room for public and business use, and an additional educational resource to complement the museum. It will become an asset for the private, public, and third sectors, and provide a new income stream to reinvest in the heritage building and facilities.
- Improve the accessibility to the building, including reconfiguring doorways, installing a lift, and catering for the visually impaired & hard of hearing. Making sure that all aspects of the heritage is accessible to all and engaging new audiences.
- Develop and reconfigure currently underutilised spaces including the courtyard to host local businesses alongside the town council offices. This will boost the town centre and local economy, as well as providing a new income stream to reinvest in maintaining the building and promoting the heritage.
- Develop ongoing relationships with local and regional user groups such as schools and community organisations to ensure that the Robert Owen Museum is fully utilised as both a heritage attraction and an education facility.
- Engage local businesses with the benefits of promoting our rich local heritage and developing a sense of place.
- Develop our project in alignment with other elements of the Newtown and Llanllwchaiarn Place Plan, to ensure maximum promotion and benefits for/from our heritage.
- Improve the energy efficiency of the building.

Welsh language

All interpretation materials will be bilingual, including all of the exhibitions in the renovated Robert Owen Museum. Having the Welsh language prominent right in the Town Centre where visitors and local communities congregate will boost it's visibility and be a major improvement on the current situation.

We will advertise all project roles with a desirability for Welsh Language speakers, and there is a

discussion to be had whether this should be ‘essential’ for the Community Heritage Officer so they can host bilingual events and engage with the Welsh medium schools in their first language.

We would also like to recruit Welsh speaking volunteers, so that the volunteer guides in the Robert Owen Museum can interpret the heritage and engage people through the medium of Welsh.

Cash flow plan during delivery phase

We realise that this is a significant project and that the cashflow element is key.

The nature of the project also means that there will be substantial capital works during 2025, with smaller revenue costs during 2025-28, so this has also been considered when coming up with our plan to mitigate against the risks and ensure the project runs smoothly.

The capital costs are large but not insurmountable, and our plan is to arrange staged payments with the contractor, and ensure regular smaller claims to NLHF to keep the deficits low. At present Newtown and Llanllwchaiarn Town Council ha [redacted] in the bank, and of thi [redacted] are unrestricted funds that aren’t committed to other projects.

For the purpose of cashflow management, we believe that our reserves are more than enough to manage the cashflow, as long as the programme of staged payments and prompts claims are maintained throughout the capital works.

However we realise that we need to mitigate against any that an unexpected ‘one off’ invoices could potentially be too much to cover from our reserves alone.

Similar projects have received loans from the WCVA of at leas [redacted] We will also enquire about the potential for a commercial short-term loan if required to cover large expenditure during the capital works. The Development Bank of Wales is another potential avenue we wish to explore during the Development Phase as an alternative option. Any interest costs of short term loans can be covered by ourselves and our partners.

Finally, although we’re not banking on it, we are aware that match funders will be able to pay some contribution up front. This would further ease cashflow issues and reduce the need to rely on commercial loans.

The final 3 years of the project consist of lower revenue spending, which we expect to cover from our own aforementioned reserve. As activities increase with the new facilities in place and new businesses taking up residents in the newly created spaces, increased income is projected to provide additional surpluses to further relive cashflow pressures.

Development Phase:

The cashflow for the development phase will be managed through using our own reserves, which will also be the match funding for this stage.

Project start date

01/04/2025

Project end date

31/03/2028

Details of any fixed deadlines

We are relatively flexible in as much as we don’t have significant deadlines or key milestones to work around.

Match funding is sure to be one consideration, as the NLHF project and capital works will need to coincide with the external funder’s timeframes. This will become clearer during the Development Phase, but we don’t anticipate it will become a significant issue because:

i) We know the timeframe for NLHF and have a long lead in during the development phase, so we can work with the providers of match funding to ensure synergy in the proposed timeframes.
ii) We don’t require huge amounts of match funding, and I’s likely that one funder will be able to provide it all which makes the process a lot simpler than trying to align multiple funding streams.

The other consideration is that we would like to ensure that the capital works has a minimal impact on the Town Centre, surrounding businesses, and the local community. The nature of the external works means we should be able to manage this in conjunction with the contractor. However it would be preferable to avoid carrying out substantial construction works during the busy summer months if possible.

Project outcomes

A wider range of people will be involved

Our vision for Sarah Brisco House is that it becomes a valued heritage and community asset right in the Town Centre, and this means that we need to engage a much wider range of people with the building’s heritage than we do at present.

This project targets a number of specific audiences who are currently disengaged with the built and social heritage:

• Local residents: Including those currently excluded through lack of awareness, accessibility, and/or

interest.
• Young people: Including through schools and youth groups.
• Elderly & less abled: Including those currently unable to access the heritage, and those who could benefit from volunteering opportunities.
• Local Businesses & Entrepreneurs: Who are currently disengaged but could benefit by promoting and capitalising on the local heritage offer.
• Visitors / Tourists: Who currently don't know about the heritage, and aren't interested in the current interpretation.

To enable new audiences to engage and benefit from the heritage, our project proposes a number of developments and actions during the Delivery Phase:

Employing a Community Heritage Officer
During the Delivery Stage we will employ a Community Heritage Officer whose role will have a specific remit to engage new user groups and those disengaged communities. Their remit will include arranging events and activities to target specific audiences who are disengaged with the heritage, and there will be a budget allocated under the Activity Plan. The individual will also develop new relationships with key groups and organisations who can enable us to engage and work with certain groups e.g. schools & youth groups (young people), the elderly & less abled, families, and socioeconomically deprived.

Developing a new, modern Museum and Resource fit for the 21st century.
One of the reasons people are currently disengaged with the heritage is that the current Museum is so dated that people aren't attracted through the doors. Locals who have visited once, don't come again and there's no reason to recommend to others. The new Modern Museum will be an attractive attraction that will draw people of all backgrounds. It will also incorporate a wider range of local heritage in order to appeal to a wider range of people.
Entry to the museum will also remain free of charge (donations only), ensuring that cost is not a barrier to those who could otherwise be closed out.

Developing Volunteering Capacity
A key aspect of the project will be to develop the capacity of the Robert Owen Museum Volunteers to enable them to engage a wider range of people with Owen's heritage. They will receive the training, qualifications, checks (DBS etc) and materials needed to do this and receive support from the Community Heritage Officer. They will specifically target local 'disengaged' audiences, new groups on arranged visits, as well as visitors to the area.

Improved Accessibility
Improved accessibility will be a key part of ensuring that individuals and groups who currently can't access the heritage will be able to in the future. This includes changes to doorways and the building layout to enable wheelchair and pushchair access. It also includes ensuring that the museum and the building caters for those with hearing and/or visual impairments. We also propose to install an accessible toilet as explained in the NLHF guidance to avoid excluding those who depend on those facilities.

Improved Visibility and marketing
Currently you would be hard pushed to know that the Robert Owen Museum existed if you walked past because of inadequate signage and visibility. So many people are simply unaware of its existence, both locals and visitors alike. The project will address this as part of improving accessibility, by developing a new main entrance (an existing doorway) into a purpose-built gateway to the heritage. This will run in parallel with an embryonic new brand for the town focussed on Newtown as a place of innovation and renewal.

Engaging Businesses
The Community Heritage Officer will also be tasked with engaging local businesses in the Town, many of whom are disengaged with the heritage. The aim will be to establish new relationships and to promote the benefit of heritage to them and how they and the wider town can benefit by promoting it. This will run in parallel with an embryonic town partnership of public, private and voluntary sectors.

Engaging Other Building Users
The building will have a host of users who are not there for the heritage, specifically users of the Town Council services, those visiting businesses located here, users of the new multimedia conference/educational chamber, and users of the public conveniences (we intend to make the new toilets accessible for all). All these users will be encouraged and enabled to explore the museum and the other elements of the heritage building.

Heritage will be in better condition

☐

Heritage will be in better condition

Identified and better explained

☑

Identified and better explained

The project will ensure that local heritage, specifically but not exclusively the heritage of Robert Owen and the Sarah Brisco House, will be identified and better explained to a range of audiences including those currently disengaged.

The new modern Museum exhibits will directly improve both the quality and range of heritage that is identified and explained to visitors. Currently it's very dated, with printed labels giving only brief information on some items. This project will work with professional interpretation specialists to develop a narrative for the heritage and explore interactive and digital opportunities to bring the stories to life.

We'll also provide information and interpretation throughout the building to explain key heritage elements and local history to other users and encourage them to visit the Main Museum on the ground floor. These will be users who are not visiting specifically for the heritage so we will be able to explain to and engage with new audiences.

A key element of telling the story and making the heritage accessible will be through the Robert Owen Museum volunteers. Interpretation is always better with a personal touch, and the project will equip the volunteers with the skills, knowledge, materials, and confidence to engage visitors and guide them around the heritage exhibits, the building, and potentially other heritage features around the Town.
Events and Activities will also be key to our efforts to bring the heritage to life and engage new audiences to share the information with. A costed programme of activities and events will be developed during the Development Phase and presented in the Activity Plan.

One type of activity we are keen to develop is specific educational talks, tours, and workshops with local groups and organisations. We particularly want to work with local schools, who have already engaged with us and identified this as a great educational facility and opportunity for the pupils. It's close and accessible enough for Newtown's Primary and Secondary Schools, and the quality of the attraction should enable us to attract schools and other groups from across Mid Wales.

Finally we intend to improve the information available digitally online. The Robert Owen Museum currently has a website that interprets some elements of local heritage. But the work going into developing the new museum will enable this to be updated and to present a much more comprehensive interpretation. Making the heritage accessible to all with an internet connection anywhere in the world, even if they can't visit us in person.

The work on Interpretation & Activity Planning undertaken during the Development stage will be key to achieving this particular outcome.

People will have developed skills



People will have developed skills

During the project we expect three groups of people to have developed new skills that will not only benefit and increase the capacity of the organisation, but also improve the individual's employability and future work opportunities. The training programme will be developed as part of the Activity Plan:

- Contributors and participants
We intend that those participating in some of the heritage events and activities (that will be developed in the Development Stage as part of the Activity Plan) to learn new skills, be them accredited qualification of informal skills. We are specifically interested in providing opportunities for school pupils to develop new skills that can strengthen their CV's and enable personal development for future employment opportunities.

- Volunteers
The Robert Owen Museum is volunteer led, and their hard work has maintained the Museum for years. However they lack the capacity, both in skills and numbers, to develop the heritage offer further and to engage a wider range of people.
With this in mind we intend to develop a bespoke but flexible training programme to enable volunteers (existing and newly recruited through the project!) to gain new skills to ensure the long-term management of our heritage assets, and enable us to share it with visitors. This will include opportunities to gain skills that benefit the current activities and enable volunteers to take on new roles and experiences e.g. interpretation and oral storytelling, maintenance of heritage assets and exhibitions, or more transferable skills such as training in management and finance training.
We appreciate that training needs and requirements will also change as new, perhaps inexperienced volunteers are recruited, existing ones leave, and new activities develop that creates the need for new skills.

- Project Staff
The project will employ a Project Manager during the Development Stage, whilst two post will be required for Delivery, a Project Manager and a Community Heritage Officer. These posts will be great opportunities for these individuals to develop skills and experience relevant to the heritage sector given the range of tasks and activities they involve. And we will allocate a funded training programme in the Activity Plan to enable them to develop their skills further, either to strengthen their weaknesses or build on their strengths.
We also hope to train some of the Town Council's staff (the other project partners don't have paid staff) who will be involved in supporting the project delivery and/or responsible for securing a sustainable legacy for the project once this funding ends. These opportunities will be identified and developed during the Development Phase when the needs of the project and potential opportunities become clearer.

- Apprenticeship

This is not something we have been considering. However we do recognise the potential, so during the Development Stage we will explore potential opportunities to offer an apprenticeship to a young person, potentially as an affordable way of providing support for the Robert Owen Museum in partnership with local education provider.

People will have learned about heritage

☐

People will have learned about heritage

People will have greater wellbeing

☐

People will have greater wellbeing

The organisation will be more resilient

☑

The organisation will be more resilient

The project will make all three partners more resilient in the long term, and is crucial for the long term resilience of of both the Sarah Brisco Trust and the Robert Owen Museum. This in turn will secure the sustainable future of the Listed Building and it's unique heritage assets..

The Newtown and Llanllwchaiarn Town Council

Financially the Town Council is a robust and resilient organisation with strong governance. However, as Sarah Brisco House doesn't comply with the accessibility guidelines in the equalities act, it could be forced to find other more suitable premises. This lack of certainty on its future creates some instability, especially regarding new investment projects in Sarah Brisco House where it is the main tenant on a long term lease.

Moving the Town Council Offices out of the Town Centre would make it harder for local residents to 'access to democracy' and civil services, as it would likely end up in an out-of-town office complex which wouldn't have the proximity to the community or the public transport links that Sarah Brisco House offers.

This project will enable the council to stay at SB House, stay connected to the local community, and continue to support and finance the management and maintenance of the Listed building, the Museum, and other heritage assets.

The Sarah Brisco Trust

The trust was founded for the sole purpose of taking ownership of the building to preserve the historic structure and providing and maintaining a Museum of Robert Owen artifacts and a reading room for the benefit and use of the inhabitants of the Town of Newtown & Llanllwchaiarn and the surrounding area.

The trust doesn't have many assets or resources other than the building, and it's only income is derived from the rent that the Town Council pays as main tenant. However the lease with the Town Council puts the responsibility for maintaining the heritage building and meeting all running costs on the Town Council which guarnates the future of Sarah Brisco House.

If they are forced to move out, then it's very difficult to see how the Sarah Brisco Trust survives. It has a duty to maintain the Museum and reading room, but this ground floor area would be the main draw for a private sector tenant. So there's a real danger that the heritage assets would be lost, or more likely that the building in it's current condition and with the covenants for a Museum and Reading Room isn't attractive to a private sector tenant (that would have to cover the running cost of the Museum as the Town Council currently does). This would mean the building being empty, and without any income the Sarah Brisco Trust would run out of money within a short space of time, putting the future of the heritage assets at risk.

This project would guarantee the future of the Town Council at the premises, and extend the terms of the lease to secure it's future for the next 100 years.

The Robert Owen Museum

The Museum is managed and run entirely by volunteers and trustees. Its only income is from donations and some grant funding, and it pays a nominal peppercorn rent. It's therefore completely reliant on the Town Council for both the space and running costs.

If the Town Council is forced to move out, the Museum would either be left unable to meet the running costs and have to close, or be at the mercy of private tenants who would undoubtedly want the prime space on the ground floor for their own activities.

The Museum is also dated and finding it hard to attract new volunteers. This means opening hour are limited and visitor numbers are low. This project will develop modern exhibits and develop their volunteer capacity and skills to enable them to increase footfall and outreach activities, thereby generating more

income (donations & activities) to move towards self-sufficiency.

Partnership Working

The three partners above already work well together, but this project will increase this collaboration and make it official through the partnership agreement. This will help secure the future of all three organisations (that all depend on each other) for generations to come, and enable then to keep working together to conserve, maintain, develop and promote the Heritage Building, Museum, and wider heritage assets.

A better place to live, work or visit



A better place to live, work or visit

This has been the key drivers behind our work over the past four years to explore opportunities to transform SB House and secure its sustainable future for the benefit of the local community.
The local community consultation (2019-21) identified how important the heritage is to local people, and how they also feel it's currently underutilised and not managed for the benefit of the town. This project seeks to address this in accordance with the vision of the town council and the aims and objectives of the Newtown & Llanllwchaiarn Place Plan as agreed by the local community and stakeholders. Specifically it addresses the first and third sections of the Plan:
- Newtown: A Great Place To Live, Learn & Work – Character & Heritage; Community Facilities; Business, Learning & Employment.
- Destination Newtown – Town Centre Experience; Tourism, Culture & Attractions.

A Better Place to live.
The ward where SB House is located (Newtown East), is ranked 379 out of 1909 LSOAs in Wales according to the Welsh Index of National Deprivation placing it amongst the 20% most deprived in the country. To address this the Town Centre is currently undergoing a number of regeneration projects of which the proposed development of SB House is an important element, and key to a developed a heritage focused sense of place. Other developments include:
- Transforming the old betting shop into a Repair & Re-use drop in hub for 'Circular Economy Mid Wales', a development the Town Council has been instrumental in facilitating.
- The £500,000 Green Infrastructure project.
- The new Health Hub will also be located in the Town Centre, a key part of delivering the Powys Wellbeing Programme and bringing in more people to the centre.
One of our key aims is "Developing an accessible Community Resource Centre at the heart of the community." The project will ensure that the Town Council civic services are accessible and at the heart of the community. It will also provide a local attraction and educational facility for local people, schools,and community groups.
A programme of heritage events and activities will be developed, providing new opportunities for learning, socialising, and entertainment in a communal space for all ages. They will also be an opportunity to bridge generations and bring different groups and communities of people together.
New volunteering opportunities will benefit local people, especially those who might be isolated during the week. New partnerships will be developed between individuals, businesses and organisations. And the project will contribute to a vibrant town centre, and a significant improvement to this public space.

A Better Place to Work
This project will transform underutilised space within the building to provide affordable space for small businesses and entrepreneurs to establish themselves right in the Town Centre. In a heritage Listed Building instead of a soulless business park.There's also an opportunity to create hotdesking opportunities in an unique heritage environment.
The new Museum will also increase the footfall to the Town Centre, benefiting local businesses such as the caffes,coffee shops,and retailers. We will also work with local businesses to encourage the promotion of local heritage as a benefit to their business and create a network of businesses who can work together to achieve this in the Town and surrounding areas.
The project will develop a networked multipurposed space that businesses can use for meetings, conferences, virtual gatherings etc in an unique heritage surrounding.
The project itself will create two new full-time posts for local people enabling them to work and develop their skills locally so that hopefully they can benefit the local heritage sector for years to come.

A Better Place to Visit
The RO Museum should be a highlight of a visit to Mid Wales, let alone Newtown. But currently this is not the case. This project will develop one of the most modern and impressive small museums in Wales, ensuring that it's a must-visit for all tourists.
As well as having a better-quality Museum it will also increase the range of heritage interpreted. Giving a platform to other aspects of local history, landscape and townscape, such as Newtown being the location of the first mail-order retail business and the scene of the first Chartist demonstration in Wales in 1838.
Visitors will also be encouraged to participate in the programme of activities and events. We will targeting some activities specifically at visitors during the peak season.
Key to the visitors experience at the Museum, events and activities will be the volunteers. This project will provide them with the knowledge, skills, and materials required to engage the visitors with the local heritage and give them an enjoyable experience.
Finally, the project contributes to the wider effort to regenerate the Town Centre, which will create a better and more vibrant experience for locals and visitors alike.

The local economy will be boosted

The local economy will be boosted

Development Costs

Grant requested

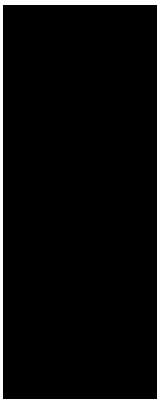
Total cost

Original total cost

Total cash contributions

Total development costs VAT

Grant percentage

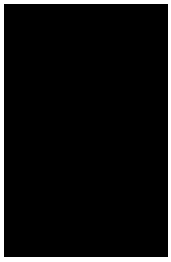


Development grant award

Original development grant award

Agreed costs (development)

Development Payment Percentage



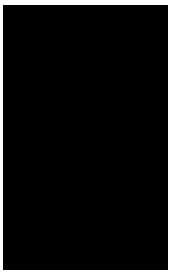
Delivery Costs

Potential delivery grant request

Potential total delivery costs

Potential delivery cash contributions

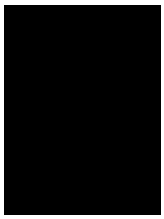
Potential delivery grant percentage



Potential total capital costs

Potential total activity costs

Potential total other costs



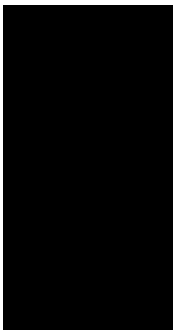
Total Costs

Grant requested development & delivery

Total cost development & delivery

Total contributions for dev & delivery

Grant percentage development & delivery



After the project ends

Maintaining outcomes and running costs

The objective of this project is to provide a sustainable long-term future for both the building and the heritage facilities.

Maintaining Project Outcomes

- Involve wider range of people:Through ongoing maintenance, promotion, and management of the museum by the Robert Owen Museum trustees and volunteers, & continued support by partners in this effort. The volunteers will be key and an ongoing programme of development & support will be developed to maintain their numbers and capacity in the future.
- People developed skills:Develop a programme of ongoing development and peer learning for staff & volunteers as part of the legacy plan for the project. Including providing local opportunities for skills development through workshops, courses, and work experience.
- Heritage better identified & explained:By developing the cvolunteer capacity to maintain, interpret, promote, and develop the Museum exhibits and other heritage interpretation.A commitment to keep digital/online information accessible and current.
- Local area better place to live, learn, work & visit:By maintaining Sarah Brisco House, its heritage assets, & community facilities for the next generations.Financial sustainability will be secured via the maintenance agreement with the Town Council & newly developed income streams reinvested in the ongoing delivery of benefits to locals,learners,workers, and visitors alike.

Managing & maintaining work we have done.

As owners, the Sarah Brisco Trust will oversee that the ongoing maintenance and management of the projects work is maintained, holding the Town Council accountable as anchor tenants.
The structural changes and improvements will be maintained by the Town Council under the terms of their lease. And the increased usage of the building including new tenant contracts, also managed by their staff.
The Museum Volunteers will be responsible for managing and maintaining the new Museum exhibits, and they will receive the training, support, and tools to do achieve this as part of this project.

Financial Sustainability

As a partnership we are in the fortunate position that as long as they are not forced to vacate the building because of accessibility issues, the Town Council are fully committed to funding the ongoing maintenance of the building and its running costs for the duration of the long-term lease.
The lease currently runs until November 2078, however the intention by all partners is to review this if this project can be realised. This will ensure that the terms and conditions of the lease are consistent with the management of the transformed building and will also enable us to extend its term even further. There is no intention to change the terms regarding the Town Council's responsibility for maintenance and running costs.
With the Town Council's support, the buildings financial sustainability is secured. The museum, even in its current state, is also holding its own financially due to the hard work of the volunteers. In the financial year to October 2021 it had a surplus of £6,764 from a turnover of £18,326.
This project will increase the current financial sustainability of Sarah Brisco House by:
• Providing additional income from renting out office/desk space to local businesses and entrepreneurs.
• Providing new income stream from enabling the current council chamber to be rented out as a multipurpose network conference and educational facility.
• Increasing the footfall to the Robert Owen Museum (through a better attraction and better accessibility), leading to an increase in donations.
• Hosting events and activities in the newly developed facilities, and in the community e.g. regular school visits.
• The energy efficiency of the building will be improved, thus reducing running costs.

Continuing to engage a wider range of people

The RO Museum and its volunteers is key.The Museum has been engaging the public with the local heritage since 1922 and on this site since 1983. However in recent years engagement has fallen as the Museum has fallen behind modern contemporaries an attraction and educational facility.
The newly developed exhibits will attract new audiences including locals,community organisations, and schools.The increased accessibility will enable the less able to engage with the heritage for the first time. Entry to the museum will remain 'donation only' ensuring that cost is no barrier. We intend to encourage those who engage with the Town Council & private tenants to visit the museum, attracting those who'd never visit otherwise.In the same way the toilets will be 'Public Toilets', getting people through the door off the main street.
The capacity of the RO Museum Volunteers will be developed and regular events established by the Community Heritage Officer to target currently excluded audiences will be continued by the volunteers.Increased volunteer capacity will also enable us to increase our current opening hours and engage a wider range of people.

Embedding skills and knowledge

Our aim is to establish a resilient partnership that will secure the long-term future of the building and its heritage assets for future generations. To achieve this we have to ensure that the knowledge, skills, and experiences are shared between partners and never become the sole responsibility of a single person. This will prepare us for life after the project, and also against potential turnover in staff and volunteers. The development of formal and informal partnerships is a feature of present-day Newtown e.g. a well-established Newtown Network (a Covid response with post-Covid legacy), an established Food Festival partnership, an embryonic Town Partnership being developed between public, private and voluntary sectors, and informal partnerships established in Community Asset Transfer and Reuse and Repair projects.

Therefore we will allocate a training budget not only for the two members of staff directly employed by the project, but also to the other key staff at the Town Council, and for the volunteers (existing and newly recruited by the project) of both the Sarah Brisco Trust and Robert Owen Museum.

Both the Project Manager and the Community Heritage Officer will be encouraged to share their knowledge and learning with each other, representatives and staff of the partner organisations, and volunteers. Planning for a post project future where it's possible neither post will be sustainably viable once grant funding ends.

Developing the capacity of the volunteers will be especially important as they will be responsible for managing the heritage exhibits of the museum and engaging with the public on a daily basis and are best placed to interpret the heritage day-to-day. They will also be key to cleaning and maintaining the heritage interpretation and exhibits. Qualifications and required certification such as DBS checks will also need to be provided.

A staff & volunteer training programme will be developed during the Development Stage as part of the Activity Plan, and we envisage that it will cover a variety of elements from project & financial management

down to interpretation and delivering events. Information sharing workshops will also be held, and we'll try and make these more social and informal way to engage with as many volunteers and members as possible.

Personal relationships are key in these projects to develop and maintain partnerships and networks, and we will ensure that Project Board Members and representatives of the three partner organisations are included in these interactions so that partners and participants develop trusted relationship and familiarity with the organisations rather than with individuals. This will be especially key with regular user groups, such as schools and community organisations; And also with strategic / statutory organisations who have the capacity to support us going forward.

The evaluation work commissioned will have a requirement to share knowledge and lessons learnt with the wider organisation, as well as with partners and other projects. This will be through information sharing events as mentioned above, and also easy to read summaries of key lessons and learnings.

Finally as part of the Legacy Planning we want to explore the potential to evolve the Community Heritage Officer post into a permanent position funded by our own income streams to support the Museum Volunteers and retain key skills, knowledge and relationships within the organisation.

How will you evaluate your project?

Deio Jones, who is currently commissioned by the partnership via 'Resources for Change' and is supporting the preparation of this application is also an experienced evaluation consultant, who has also led a previous NLHF project through its Development Phase and undertaken numerous NLHF evaluations on other projects in Wales and England. In this regard we are lucky as he understands the need for and value of the evaluation process and what the work entails and has advised us on how to go about it.

Evaluating the success of the project will be based on:
- Identifying the current situation (baseline during Delivery Stage)
- Ensure a clear vision and clear outcomes from the beginning.
- Assess project across the project against set milestones.

To achieve this we will need to develop a Monitoring & Evaluation Plan / Framework. Our intention is to commission this work from an experienced external organisation / consultancy early during the development phase. This will enable the commissioned organisation to be involved from the start, with the option to extend their contract into the Delivery phase subject to the funding being awarded and us being satisfied by the quality of their work. It will also enable them to identify what baseline information is required before the delivery starts and help us to collate it.

The Evaluation Framework will identify what information needs collating, when, and outlines how to do it. It will be key to ensuring that the different staff, groups, and volunteers are able to collaborate to efficiently collect the different data for various elements of the work. For example this could be through preparing a toolkit of templates and signing in sheets, and a framework for recording events, volunteer activities etc.

It will also be key in evaluating the impact of the project on the wider community, and for this we wish to adopt an ongoing conversation with the community through questionnaires, surveys, drop-in sessions etc to capture changing opinions, perspectives, awareness, and knowledge.

The Project Manager will be responsible for managing the Monitoring and Evaluation Process, reporting monthly to the Project Board through the Clerk. We will also ensure that a budget is allocated for any training for staff and volunteers.

We are aware that different funders have different requirements regarding Monitoring & Evaluation, and we are trying to ensure it is a streamlined approach that doesn't duplicate effort and put any unnecessary burden on our staff and volunteers.

We'd be happy to discuss the above with you, to ensure that our efforts address your needs at NLHF, and so we can learn lessons and take on board good practices from other similar projects. In the same spirit we will also engage with other community projects to learn from their approaches to evaluation.

The commissioned evaluation consultants will be tasked with producing a mid-term and final report, which will both be submitted with the completion report.

Your organisation

Governance and Senior management review

Currently our Governance and Management arrangements for the heritage are very well defined.

• The Town Council is responsible for all aspect of the management of the Heritage Building through the term of their lease (see supporting documents). They are held to account for the building by the Sarah Brisco Trust as the owners of the building (and therefore their landlord), and report regularly on any work that is required or undertaken
• The heritage assets of the Robert Owen Museum are managed by the charity itself. There is a board of trustees that act as a decision-making body and this group meets quarterly. The day-to-day management of the Museum is closely monitored by the trustees, but delegated to a group of officers who have specific roles within the Museum.

Both Sarah Brisco House and the Robert Owen Museum review the governance arrangements annually. The Sarah Brisco Trust is composed of 6 ex-officio trustees and 4 co-opted trustees.
The Newton and Llanllwchaiarn Town Council Councillors also review their internal Governance documents and procedures on an annual basis at their annual meeting. They adopted some changes to their Governance Documents in June 2023 following the latest guidance from One Voice Wales, but these don't affect the management of the heritage. The town council nominates 6 representatives as ex-officio to the Sarah Brisco Trust.

The last significant change in the Governance of the Heritage was in 2019 when the 'Sarah Brisco House Transformation Team' was established to explore the potential for developing the heritage assets, and it is made up of representatives of the three main partners mentioned above.

Since then there hasn't been any significant changes to Governance or management, primarily because of the well-established arrangements outlined above that work efficiently, and the lack of any significant change of circumstances that would require an intervention. One current development is the drawing up of an official partnership agreement between the three main partners as it's a requirement of the NLHF application.

Undertaking governance review? ☑

when are you undertaking this review?

We intend to review the Governance of the Heritage Building during the Development Stage, to ensure that it evolves to remain fit for purpose in light of the work being undertaken on it and changes/improvements being implemented to the heritage assets, and to secure the sustainable management of the new and modernised heritage assets going forward.

We will then review the Governance & Management arrangements again at regular periods during the Delivery stage when the capital works has been undertaken to refine our arrangements once all the work has been finalised. We'll also review once more at the end of the project to give us confidence that all is in place to deliver the project's long-term legacy.

Undertaking the review during the project also means we can draw on the learning and advice from the commissioned evaluators and other experienced stakeholders (including NLHF) to help us with the process. We'll also engage with WCVA for further advice.

The Town Council currently reviews many of its Governance documents annually (some policies are reviewed biannually or triennially), and we propose a similar annual review of the Governance and Management of the heritage building after the project has ended.

Other information

Declaration section

Grant decision information

Acknowledgment checks

Internal Use only

Contact Information

Name	Ed Humphreys	**Contact Owner**	[redacted]
Organisation Name	Newtown and Llanllwchaiarn Town Council	**Is Contact & Organisation address same**	☐
Title		**Is Authorised Signatory?**	☐
Email	[redacted]	**Authorised Signatory Role**	
Phone	[redacted]	**Other communication needs for contact**	
Mobile		**SignatoryRole**	

Heritage Fund

Permission to Start Form Development phase

Project title: Sarah Briscoe House Transformation

Project reference number: NL-22-00178

Grant expiry date: 31/12/2024

Organisation: Newtown and Llanllwchaiarn Town Council

1. Approved Purposes

1. Develop all proposals, documents and information to the standard required for a second round, delivery stage application and in line with Application and Receiving a Grant guidance.
2. Continue fundraising to secure partnership/match funding
3. High visibility acknowledgement of the National Lottery Heritage Fund on site, online and in all project activities, ensuring National Lottery players are thanked for their support.
4. Recruit a Project Manager/Co-Ordinator for the project
5. Develop a detailed Business Plan for Sarah Briscoe House
6. Ensure use of the Welsh language is incorporated into the project and all project outputs are bilingual.
7. Commission: Evaluation Consultant, Activity Plan, Draft Conservation Plan and a consultant to create an Interpretation Plan
8. Undertake community consultation to inform activity and interpretation planning
9. Ensure all digital outputs are freely available, usable, and licensed for use by others under the Creative Commons 'Attribution 4.0 International (CC-BY4.0) licence, as per our guidance
10. Create an evaluation plan at the start of the development phase, hold evaluation reviews throughout the duration and provide an Evaluation Report on development phase completion.
11. Ensure that environmental sustainability is a key consideration in developing delivery stage proposals.
12. Commission an Architect and Quantity Surveyor to develop detailed plans to RIBA Stage 3
13. Apply for Listed Buildings Consent and undertake a Heritage Impact Assessment
14. Undertake a Project Governance review

2. Agreed Costs

Your project costs

Cost heading	Agreed costs (£)	Agreed VAT (£)	Agreed total costs (£)
New staff	[redacted]		
Professional fees	[redacted]		
Capacity Building Activity			
Recruitment			
Contingency			
Total (£)			

Total VAT allocation: £0.00

Total contingency allocation: [redacted]

Payment percentage: [redacted]

3. Cost breakdown and cashflow with an indication of when you will be seeking grant payments

Uploaded files:

---

8 Detailed Cost Breakdown Final V2 corrected.xlsx
has been uploaded

Cash and non-cash contributions

4. Cash contributions

Cash contributions summary

Description of funding	Amount expected (£)
AHF Development Grant - Secured	[redacted]
Partner Contribution	

5. Evidence of secured cash contributions

Yes, I will upload evidence of secured cash contributions

Uploaded files:

Financial Commitment SBT.pdf
has been uploaded

Financial Commitment All Team.pdf
has been uploaded

Financial Commitment ROM.pdf
has been uploaded

Financial Commitment NLTC.pdf
has been uploaded

Financial Commitment AHF.pdf
has been uploaded

---

6. Evidence of fundraising plan

Yes, I will upload a fundraising plan

Uploaded files:

Fundraising plan.pdf
has been uploaded

---

7. Non-cash contributions

Non-cash contributions summary

Description of funding	Amount expected (£)

Timetable or programme

8. Proposed timetable or work programme with milestones including dates for getting grant payments and giving project updates

Uploaded files:

---

3 Delivery Phase Timetable.xlsx
has been uploaded

---

1 Development Phase Timetable.xlsx
has been uploaded

Project management and procurement

9. Project management structure, including methods for choosing consultants, contracts and suppliers

Uploaded files:

---

9 Partnership Agreement.pdf
has been uploaded

Evidence of ownership

10. Evidence of who owns any property that forms part of the project and information on restrictions or other claims on it

I will upload evidence of ownership

Uploaded files:

Uploaded files:

17a HM Land Registry - Title and Plan.pdf
has been uploaded

Statutory permission

No new statutory permissions or licenses

Declaration

By completing this Declaration, you are confirming that your organisation accepts these terms and any Additional Conditions that are set out in Appendix 2 of your Grant Notification Letter or grant contract. All joint grantees must confirm that they accept the standard terms of grant by adding a contact name and signing at the end of the declaration. Project partners are not required to sign the declaration unless they are also joint grantees.

We are committed to being as open as possible. This includes being clear about how we will use your application form and other documents you give us. As a public organisation we have to follow all data protection laws and regulations, to include the UK General Data Protection Regulations and the Data Protection Act 2018 (the 'Data Protection legislation'). As defined by the Data Protection legislation the Trustees of the National Heritage Memorial Fund (who administer the National Lottery Heritage Fund) is a data controller.

When you completed the Declaration at the end of the application form, you confirmed that you understood our legal responsibilities under data protection legislation and the Freedom of Information Act 2000 and had no objection to us releasing the 'The Heritage', 'Your Project' and 'Project Outcomes' sections of the application form to anyone who asked to see them. If there was any information in these sections of the form that you did not want made publicly available, you had an opportunity to explain your reasons.

We will take these into account when we respond to any request for access to those sections. We may also be asked to release other information that you provided to us plus information included in monitoring documentation you submit. We will respond to these requests after taking account of your rights and expectations under Data Protection legislation. In those cases, we will always consult you first. We will not be responsible for any loss or damage you suffer as a result of our meeting these responsibilities.

When you completed the Declaration you also agreed that we would use your application form and the other information you gave us, including any personal

information covered by Data Protection legislation, for the following purposes:

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

We may use your photographs in publicity material. If your photographs include people, you must gain their permission (or that of parents or guardians for children under 16) before you submit them to us. You agree to ensure that you have the written consent of the copyright owner of the images you send to us so that we may use any of them to represent the project.

I confirm that:

- the organisation named on this application has given me the authority to complete this application on its behalf.
- the activity in the application falls within the purposes and legal powers of the organisation.
- the organisation has the power to accept and pay back the grant.
- we will keep to the standard terms of grant, and any further terms or conditions as set out in the grant notification letter, or in any contract prepared specifically for the project.
- as far as I know, the information I have supplied is true and correct and that anything I supply in future will be true and correct.

I agree with the above statements.

Signatories

Person completing the form signature

Full name: Edward James Humphreys

Position: Town Clerk

Organisation: Newtown and Llanllwchaiarn Town Council

Signature: [redacted]

Date: 26/9/2024

Authorised signatories sign

Names and signatures of 2 people who are authorised to sign documents for your organisation

Signatory One for your organisation

Full name: [redacted]

Signature:

Date: 26.9.24

Signatory Two for your organisation

Full name: [redacted]

Signature:

Date: 26-09-2024

Project Partner

Project partner organisation's name:

SBH Transformation Joint Project Team (Town Council Robert Owen Museum Sarah Bisco Trust)

Name of person signing on behalf of project partner:

Edward James Humphreys

Position of person signing on behalf of project partner:

Town Clerk

Signature: [redacted]

Date: 26/9/2021

National Heritage Memorial Fund sign

This section is for National Lottery Heritage Fund use only

We have reviewed your request and give our permission for you to start the project

Signed for NHMF: [redacted]....

Date: 10/12/21