

- Assist with finding new funding streams including the Discover England Fund and building the product and relationships with WHS to submit a joint bid.

The Trust has commissioned consultant Lisa Jenkins to design and maintain the Trust's web site and social media presents.

3.3 Support

Board of Trustees

The resumés of the trustees may be seen in Appendix B. Trustees have taken roles in accordance with their skills as follows:

Trust Governance:

Andrew Main (Chair); Dr Tom Graham (Secretary); Gail Reed (Treasurer – an interim post until the actual post is filled)

Fund raising:

Dr Alan Butler, Dr Geri Parlby

The Guildhall Project:

Ian Penrose, Andrew Main, Martin Wood

Community contact:

Dr Geri Parlby

Marketing and Promotion:

Ian Wright, Andrew Main

Walks, Talks, Oral history projects:

Alex Mettler, Dr Alan Butler

Education and heritage:

Prof Dan Maudlin

Web site and social media:

Dr Tom Graham

Volunteer time

In the initial period volunteer time will include helping in the Visitor Information Point, supporting fund raising events, and acting as ambassadors for the Trust to increase the profile (see separate 'Volunteer Role description').

The Trust has been and will continue to be ably supported by Caroline Rae whose skills from her former role with Devon County Council have been invaluable – see Appendix B for her resumé.

Other supporters in the community

The Trust is supported in its work by the Miss Ivy Events Ltd., Walter C Parsons in Tavistock and Mount Kelly.

4. Potential Income Streams

4.1 Research plan

Use the following table to allocate research tasks to trustees, staff and external supporters who will work on the programme.

Some of this base work below will be picked up by the appointed Development Officer to move it forward as part of the HLF Activity Plan from March 2018. Funding from HLF, TTC and WHS excluded.

Research task	What information needed	By whom	By when
<i>Trusts & Foundations</i>	<i>Create a list of local and national trusts & other foundations, their application criteria, their deadlines</i>	Alan Butler Caroline Rae	<i>March 2018</i>
Events	Research, plan/cost, risk assess, advertise, implement	Geri Parlby Ian Wright Andrew Main Jo Butler Alex Mettler Martin Wood	March 2018
Guided walks	Plan/cost, risk assess, advertise, implement	Geri Parlby Alex Mettler Jo Butler	March 2018
Sponsorship	Plan/cost, research local companies, their needs, what would best attract them to sponsor	Jo Butler Ian Wright Ian Penrose	March 2018
Bequests	Research legal requirements and how to implement, plan/cost	Tom Graham Ian Penrose	March 2018
On line giving	Research other on line giving portals, check meet Charity Commissions requirements for fund raising, implement	Tom Graham Ian Wright Jo Butler	June 2018
Shopping portal	Research other shopping portals suitable for registered charities, implement	Tom Graham Ian Wright Jo Butler	March 2018
Retail sales	Research, plan/cost, risk assess suitable products	Jo Butler Andrew Main	Feb 2018
VIP	Research, plan/cost, risk assess sponsors, implement	Jo Butler Andrew Main Geri Parlby	March 2018
Community funds	Research suitable community organisations for annual grants, their application criteria and deadlines	Geri Parlby Alex Mettler Alan Butler	Feb 2018

The information each researcher discovers should be kept in a central file to which everyone who needs to has access.

5. Fundraising Environment

5.1 Range of organisations

(List the organisations in your community, region, sector which could be competing for similar funds from similar funders. Give a statement on each and an analysis of whether or not you could work with them on joint applications; learn from what they are doing or simply keep aware of the competition there is for some sources of funding):

Tavistock Heritage Trust holds a unique position as the charity partner to the Heritage Lottery Fund Stage 2 bid for the transformation of Tavistock Guildhall and associated buildings into a WHS Gateway Centre. Related organisations that focus on areas similar to part of Tavistock Heritage Trust's aims include:

1. Tavistock Heritage which has an overview of heritage in the area being made up from representatives of a number of heritage interested bodies. One of its remits is to support and advise the Trust on local heritage related issues. *Could compete with applications to the local authorities and national funders.*
2. Tamar Valley AONB and other areas of the WHS Mining Heritage areas of Devon and Cornwall, however Tavistock is naturally placed to provide the western Gateway to the entire WHS sites. Both have shown support of the Trusts aims. *Could compete with applications to the HLF and other national funders.*
3. Tavistock Museum with its collection of important material pertaining to the history of the town. It is the intentions that the trust works with the Museum to ensure that the tow trusts are not competing with similar aims of objects. *Could compete for local group funding and local authority funding.*

5.2 Funding environment

(This section should be a statement on the current funding environment for your organisation. List all the factors which are affecting funders' ability to support the work being done and any short, medium and long-term factors which need to be considered).

As stated earlier Tavistock Heritage Trust wishes to be financially robust without long term over dependence on grant funding and this funding strategy reflects this. As with all charities and businesses, income generation is dependent on many changeable factors, including the wider financial climate, the appeal of the 'message' to potential donors, the reputation of the parties involved, and the willingness of people to volunteer their time and skills. Good governance of the Trust, including regular monitoring and updating of risk registers and mitigation measures, and a fundraising strategy that is regularly reviewed and re-energised should help to offset some of the vagaries of the economic climate.

6. The Case for support

6.1 The key messages

(Develop a number of statements which can be used to persuade funders to support your organisation and your current needs. These will be drawn from the key strengths of your organisation and how they relate to the benefits funders wish to see their funding providing.)

- ✓ High quality resources
- ✓ Network of sites in the WHS, stretching beyond Tavistock
- ✓ Willingness to work in partnership
- ✓ Enthusiastic local schools and other partner organisations
- ✓ Internationally important heritage
- ✓ Size and nature of local market for heritage activity, in particular number of tourist visitors
- ✓ Robust governance as registered charitable business limited by guarantee
- ✓ Good range of experience and professional skill recruited within trustee body
- ✓ Existence of Trust requested by Heritage Lottery Fund
- ✓ Tavistock based and run by local people for the benefit of people in Tavistock, visitors and the WHS

6.2 Contingencies

The Trusts business plan will be reviewed quarterly which will include an assessment of the success of the funding plan and to determine amendments to the plan if funding has not been forthcoming.

7. Implementation plan

7.1 Budget detail

The Trust has set in place that a full income and expenditure forecast with a review of the risks for each fund raising activities is to be presented to the Board of Trustee for discussion and consideration before the approval to proceed, is granted by the Board.

7.2 Timetable

As stated previously in Section 4.1 the initial research work of the trustees, staff and external supporters will be complete and in place at the appointment of the Development Officer in March 2018 as determined by the HLF Stage 2 bid. Once the Officer is in place monthly meetings will be held between the Officer and designated Trustees to prepare a long term plan for the approval of the Trust in accordance with the HLF requirements. This plan which will include all Trust funding sources will be reviewed and agreed by the Board.

8. Monitoring and evaluation

8.1 Process

Tavistock Heritage Trust's predicted spend and income is detailed in its Business Plan. The Income & Expenditure is reviewed at each Board meeting and trustees are advised of agreed expenditure for the coming period. Further day-to-day monitoring is carried out by the Treasurer.

Part of the Board monitoring and review will be to highlight any potential shortfalls or excesses in income, and from which source (e.g. events, sponsorship, grants etc). This will trigger an ongoing basis consideration of the fundraising strategy. On an annual basis a more formal review of the fundraising strategy will be undertaken and changes made if necessary to plans for the following year.

Appendix A

Provisional fund raising events for 2018:

January	Launch the Online Donations Campaign.
February	Charity raffle and tea party at the Bedford Hotel.
March	Heritage Walking Tour.
April	Charity raffle and tea party at the Bedford Hotel.
May	Heritage Walking Tour.
June	Auction Night at the Guildhall.
July	Recycle for us month.
August	Heritage Walking Tour.
September	Event during National Heritage Week - suggested connection is the 170 th anniversary of the opening of the Guildhall. Fundraising lunch at the Moorland Garden Hotel.
October	Goose Fair – Guildhall open to the public.
November	Christmas Craft making workshop in the Guildhall.
December	Dickensian Evening – Guildhall open to the public. Christmas fund raising lunch at the Bedford Hotel.

This list is provisional and other ideas are also being considered which are as yet preliminary and therefore not fully considered.

The above events will be running parallel with the activities set out in the HLF Activity Plan.

Appendix B

The Tavistock Heritage Trustees

Alan Butler in 2016 Alan completed his AHRC funded collaborative PhD called "Performing LGBT Pride in Plymouth 1950 -2012" with Plymouth University. The project involved the formation of and a specific LGBT history accession for the Plymouth and West Devon Record Office which sits alongside the Plymouth LGBT Community Archive. The archive comprises of over forty five oral history interviews along with memorabilia pertaining to the performance of LGBT identity in the city over a sixty-year period.

In 2012 the Plymouth LGBT Archive was awarded the "Most Inspirational" archive award by the Community Archive and Heritage Group and also informed the nine week "Pride in Our Past" exhibition in the Plymouth City Museum and Art Gallery.

Alan has since been invited to become a member of CAHG's national committee and has spoken about his work with the archive at a number of national conferences, including the yearly LGBT archives conference at the London Metropolitan Archive, while, on a local level, taking the materials into schools and businesses in the Plymouth area. He also acts as an independent advisor with Devon and Cornwall Police.

He continues his association with Plymouth University as a research fellow and associate lecturer in the History department, with a specialism in Oral History.

Tom Graham (Secretary) grew up on Dartmoor near Tavistock and was educated firstly in the town and later in Plymouth.

A fascination with history led him to read the subject at Oxford, where he chose to remain for postgraduate study. He developed a wide research specialism across late medieval English history, including projects on the administration of debt in the Middle Ages and the history of Tavistock Abbey, as well as teaching Medieval Latin and palaeography. In 2017 he submitted and defended a doctoral thesis on late medieval towns and their relationships with the landed aristocracy.

In 2005-6 Tom acted as a caseworker in a local MP's offices in Devon and Westminster, originally as work experience and then temporary employment. Responsibilities included researching and writing briefings for MP and his staff; liaising with local authorities, other public bodies etc.; and assisting constituents in person, over the phone and in writing.

Tom provided research assistance and expertise for Dr. Miriam Marra and Dr. Tony Moore's project on 'Debt and Default in Medieval England' in 2016-17; the position involved extracting relevant information from original documents and then recording and analysing it using Excel, as well as advising on potentially-profitable routes for future inquiry.

Andrew Main (In-coming Chair) is the former Managing Partner of Stratton Street Capital LLP from which he stepped down in July 2014. He remains a Director to their Funds in Guernsey and Chairs their Luxembourg Fund Board.

He also is a Senior Adviser to a number of Far Eastern Fund Management Groups based in Hong Kong, Singapore and Mauritius and the Isle of Man.

The majority of Andrew's experience has been spent dealing with The Far East developing a wide range of financial services before founding the company. He studied at INSEAD and is a Member of the Securities Institute. He also sits as a Non-Executive on several private fund boards on behalf of a number of Asian families. He is a member of the Japan Society and the Hong Kong Association. In the past he has been a member of the British Bankers Association working group to advise on Hedge Funds.

He also serves in various capacities with the Alternate Investment Management Association. He Chairs the Next Generation Managers Group which supports the development of Independent Fund Managers starting out and developing the business. He is a founder member of the Sound Practices Committee and is also on the Markets Regulation Standing Committee. He contributed to the production of the recently published Sound Practices for Fund Board Directors and the development of a DDQ for Non-Executive Fund Directors which was published earlier this year. Locally he is a Governor of Mount Kelly Foundation.

Daniel Maudlin is a Professor of Architectural History at the University of Plymouth where he is Director of Cornerstone Heritage, an interdisciplinary external engagement heritage unit established to work with heritage organisations and local communities on co-produced heritage projects.

He has run heritage projects with a range of partners including, in the South West, the National Trust at Saltram House, Mount Edgcumbe Country Park and Powderham Castle. He previously worked as an Inspector of Historic Buildings for Historic Scotland and taught building and design history at the Universities of Glasgow and Pennsylvania. He has a PhD from the University of St Andrews and held a postdoctoral fellowship at Dalhousie University, Canada.

His publications include: *Building the British Atlantic World* (University of North Carolina Press, 2016); *The Idea of the Cottage in English Architecture, 1760–1860* (Abingdon: Routledge, 2015); *Consuming Architecture: On the Occupation, Appropriation and Interpretation of Buildings*, edited with Marcel Vellinga (Abingdon: Routledge, 2015); "Early Colonial Settlement in North America, India and the British Isles" in *Architecture and Urbanism of the British Empire (Oxford History of British Empire)* (Oxford: Oxford University Press, 2016); "British Atlantic Architectures" for *Oxford University Press Bibliographies Online* (2012); and *The Highland House Transformed: Architecture and Identity on the Edge of Empire* (Dundee: Dundee University Press, 2009). Awards and fellowships include: the 2016 Alan G. Noble Book Prize; Leverhulme Trust Major Research Fellowship on the "Inn and the Traveller in the Atlantic World"; John D. Rockefeller Fellowship, Colonial Williamsburg Foundation; Arts and Humanities Research Council Network Grant: "Transatlantic Exchanges"; Leverhulme Trust Fellowship; and the 2008 Jeffrey Cooke Prize awarded by the International Association for the Study of Traditional Environments.

Alex Mettler is a son of Middlesex, where he spent his early years. He joined Glaxo Laboratories 1955 and studied at night school, becoming a graduate of the Royal Society of Chemistry by examination in 1962 (Fellow 1977). Alex moved to Tavistock in 1976 to become Technical Manager of Farley Health Products Ltd (part of the Glaxo Group of Companies) responsible for Research and Development and Quality Assurance, becoming an executive director in 1982 with the added responsibilities for production, with overall responsibility for 600 staff and coordination of foods Research and Development worldwide for Glaxo Group. Leaving Farleys in 1986, when the annual company turnover was £45 million, Alex became a self-employed consultant advising on infant foods development and quality systems worldwide. Professional appointments include Chair of the European Dietetic Food Industry Association (IDACE) panel on Additives in Infant Foods (1983-1985); Chair of the IDACE panel on Lysinoalanine in Infants foods (1985-1986) and Industrial Adviser to the DHSS Committee on Medical Aspects of Food on Infant Feeding (1976-1984). Co-patentee of a food process in 1965 Alex published 14 papers in the academic press between 1973 and 1994. From 1987 to 1997 he was a member, and latterly Chair of PEP Research and Consultancy Ltd, the consultancy arm of Plymouth University.

A founder member of the Tavistock and District Local History Society in 1984, and community representative for the Tavistock Townscape Heritage Partnership and Key Centre Working Group since inception, inclusive of being a contributor to the Tavistock Conservation Area Character Appraisal (2009). Alex has given many talks on, and led many walks of, Tavistock townscape. Editor of the Tamar Journal (1983-1986) and joint-editor (1987-1989) Alex has published four books on aspects of Tavistock history viz *We will Remember Them - The Men of Tavistock who died in the First World War*, joint author, (2003); *Tavistock - A Photographic Portrait of England's Premier Market Town*, editor, (2005); *Lest We Forget - The Tavistock Fallen of the Second World War*, joint author, (2007); *A Devon Gem - The Bedford Hotel, Tavistock* (2013).

Gerl Pariby was born and educated in Torquay. She trained as a journalist on the Mirror Group training scheme in the 1970s working for a variety of Fleet Street newspapers. In the 1980s she was head of press at United International Pictures and then for 10 years she ran her own PR agency specialising in film and video PR. After taking time out to have two children she studied for an MA in History of Art at the Courtauld Institute and a PhD at the University of Roehampton, specialising in religious art.

Having moved back to Devon in 2003 she started teaching for Exeter University's extramural department and began running distance learning courses. She also became an accredited NADFAS lecturer and still lectures regularly on art related topics both in the UK and overseas as well as running courses and study days for the SW

Area of The Arts Society, the Devon Archaeological Society and the Art Fund. She is also an Honorary Research Fellow at the University of Roehampton with a particular interest in religious art in the early British Church. She is a Fellow of the RSA and also a Past President of the Rotary Club of Tavistock as well as sitting on the Home Committee of Rotary in Great Britain & Ireland. She is the founder and chair of REPOD (Rotarians Easing problems of Dementia); a Trustee of the Tavistock Memory Café; Vice Chair of the Tavistock Dementia Action Alliance and Chair of the Tavistock Community Sensory Garden Project. She was also the joint founder and chair of the Tavistock Heritage Festival from 2014-2016 and is an Honorary Friend of St Eustachius Church.

Ian Penrose grew up in locally and attended Plymouth College. He attended Bath University to study Architecture and whilst completing his degree undertook study tours in Europe and was awarded the RIBA prize for his drawings of Venice. He completed his BSc in Architectural Studies at Bath and gained a placement with Leonard Manasseh & Partners, in Bath. He returned to Bath University and obtained his Bachelor in Architecture degree in 1978. He completed his professional studies and became a registered architect and a member of the RIBA in 1979. In 1980 Ian returned to Devon and joined Locke Son & Newcombe in Newton Abbot and in 1982 he opened an office from them in Exeter securing a workload of commercial, domestic and health projects. Ian started his own practice in 1985 which grew steadily to thirty staff with a second office in Plymouth having commissions from Cornwall to Sussex and Yorkshire in the north. The practice had expertise in commercial, industrial, health, housing, master planning, and 'sustainable' buildings. Ian sold the practice to International PLC in 2009 and retired from formal practice. Ian has experience as board member to local charities including Age Concern Exeter, Plymouth College, The Exeter Housing Association and the Royal Western Yacht Club.

Phillip Sanders after growing up in a Devon farming family Phillip did a science based degree at university following which he entered the hotel and catering industry and progressed through the management training process to running hotels.

A career change saw him enter the National Health Service as a Work Study Officer and as a practitioner in Organisation and Method study. After a period putting in bonus schemes in the Kings College Hospital group and carrying out numerous projects to increase productivity and efficiency he moved across into general management in the NHS. His career in the NHS required the development of a range of skills including finance, personnel, recruitment, project management, health and safety, dealing with voluntary organisations, patient complaints and many other areas.

After moving back to Devon he became commissioning officer for phase 1 of the new Derriford Hospital in Plymouth working with the main contractor and design team to bring the building to completion and equipping and staffing it before opening. After a period running the new hospital he moved to join the board of a community trust also in Plymouth dealing with the non-acute elements of health care to include community services, care of the mentally ill and learning disabled where he had responsibility for the closure of a large mental illness unit and project managing the development of a number of new units. In 1997 he left the NHS and set up his own consultancy largely operating in the health care sector project managing a range of new buildings in the South West and Thames valley.

Phillip is a qualified youth leader and ran a youth club for many years. He is also a practicing assessor for the Duke of Edinburgh Award scheme. He spent 27 as member, search coordinator and chairman of the Dartmoor Rescue Group. He currently sits on the board of a Registered Provider (Housing Association) chairing their development committee. He also sits on the board of several charities.

He is a town councillor for Tavistock Council, a borough councillor and leader of West Devon, a Devon County councillor and sits as a member of Dartmoor National Park Authority and is a governor of Tavistock College.

Martin Wood was educated at King Edward's School before attending Exeter University in 1987 where he received a BA in Politics and Philosophy. In 1990 he joined the Royal Marines and during his time as a Lieutenant he carried out general infantry officer duties, including leadership and communication courses. He was responsible for the development, well-being and combat readiness of 24 commandos. In 1992 Martin returned to Exeter University to study Business Administration where he achieved a Distinction.

Following university in 1993 Martin joined N.M Rothschild & Sons Limited Structured Banking Division as a manager. His responsibilities included evaluating risk through country, company and cash flow analysis and reporting to Credit Committee on dealing lines and loan facilities to new and existing clients. In 1997 he joined Standard Bank London Limited Treasury Division, Project Finance as senior manager where his responsibility included *Deal Origination* - with specific responsibility for marketing, structuring, negotiating and overseeing execution of limited recourse project and convertible loans in that region.

In 2001 Martin moved to Benfield Advisory Corporate Finance, Advisory Services to mid-cap UK corporate clients including project finance negotiation and structuring, M&A origination and execution, asset disposal and bespoke strategic advice. Specific responsibility for developing expertise and global client base in structured finance and ran private equity investments portfolio. From 2003 Martin has been the owner/Managing Director of Vicarage Capital Limited a FCA regulated and Member of London Stock Exchange, full service brokerage house offering assistance to junior and mid cap resource companies on financial structuring and corporate development. Specialists in debt / equity arranging, IPO advice, asset valuation and M&A execution. Martin also holds Non-Executive Directorships with Kogi Iron Ltd., and Brain Works Ltd.

Martin has published articles including '*Non Recourse Finance in Africa*' - 'Mining Magazine', May 2001; '*Using ECA's in Project Finance*' - 'International Mining Review', August 2010. Martin chaired the Association of Mining Analysts 2008 – 2010 and rowed Atlantic Ocean - January to March 2003; the first successful solo crossing – La Gomera to Barbados (68 days 1 hour 57 minutes).

Ian Wright has lived in Tavistock for more than 20 years and takes a keen interest in heritage. He formerly worked as a communications manager for British Gas, ICI and latterly British Aerospace prior to becoming global head of internal communication for a Swiss-based international testing house, SGS.

From 2001 he worked as an independent adviser on communication and business change to international businesses in the UK as well as clients in the public sector working across organisations within multi-disciplinary teams to implement complex change projects and programmes.

He is a Fellow of the Institute of Internal Communication where he served on the national executive holding several offices including chair of the education committee, awards committee and national chairmanship. He is also a former member of the Institute of Public Relations.

At College Ian combined Economic and Social History with English Literature and has been an active member of the National Trust since 1991.

He hails from Stockport in North West England, a region that has transformed its understanding of its internationally significant heritage in recent decades and continues to benefit economically from its legacy of canals, ports, industries, social movements and scientific, cultural and sporting achievements.

Ian and his family moved to Tavistock in 1996 when he joined BAE in Plymouth on the leadership team of a transformation programme to create BAE Systems, the international defence contractor.

Ian has recently retired and is now a Tavistock Heritage Trustee working to bring Tavistock's unique heritage to life for today's community, for visitors and future generations.

Consultants

Jo Butler was brought up in Devon and on obtaining her BA (Hons) in European Studies & Spanish at Coventry in 1998 she moved away from the area and from 2000 to 2003 she was a team leader with Orange. Her enthusiasm for the tourism took her to Warwickshire where she became the Head of Destination Services for Shakespeare Country.

In 2009 she moved to Oxford to take up the position of Head of Destination Services for Visit Oxford. In 2014 Jo moved back to Devon to work with Bovey Castle Hotel and Buckland Tout Saints, both part of the Eden Hotel Collection as Business Development Manager building new corporate links and raising the profile of both hotels. In 2017 she set up her own consultancy business working with a variety of companies and charities. She is a founder Director of Visit Dartmoor the Tourism Delivery Partner to Dartmoor National Park Authority, and is the founder of the Dartmoor Business Network which supports local businesses in and around Dartmoor, and facilitates them in building new relationships with each other and forging new partnerships to develop additional revenue

streams. Jo is part of the Conference Plymouth Steering Group which helps to shape plans and develop new initiatives designed to make Plymouth a key destination for conferences, meetings and events, both in the South West and nationally. She is also a member of the Tamar Valley Tourism Organisation.

Lead volunteers

Caroline Rae is a graduate from Swansea with BSc(Econ) Hons (Wales) in Social Sciences, and pre 2000 she had worked for different organisations and companies including British Aerospace as Senior Contracts Officer. From 2000 she was Project manager/consultant, West Devon Environmental Network/Tamar Valley Market and Coastal Town Initiative. The work included project management, bid writing, community consultation, and strategy development. Between 2003 and 2016 Caroline was Policy and Partnerships Officer, for Devon County Council. She managed the Devon Strategic Partnership and the Board, finance and grant functions of the Safer Devon Partnership. Also, she managed relationship with various 3rd sector organisations; sat on QAVS panel for 2 years; worked with community groups getting projects going, doing community consultation and development of Parish Plans. Development of Sustainable Community Strategy for Devon with community consultation. This included management roles and responsibilities included partnership working with Devon County Council (DCC) for 13 years, building relationships with organisations and communities; administration of complex county level strategic partnerships; organising events, including large conferences; support to partners, setting up systems where necessary. Caroline was also a member of the panel that assessed groups for recommendation for Queen's Award for Voluntary Service, and that organised the annual award ceremony.