



Calderdale  
Council

# Fundraising Strategy

August 2005

# 1. Background

- 1.1.** The need for a funding scheme for the estate was recognised in 1999, when it became apparent that urgent repairs to both the aisled barn and the hall would be required in order to prevent serious structural damage and possible loss of these buildings.
- 1.2.** External advice was sought and a Feasibility Study for the estate was submitted in November 1999 with CMBC Cabinet approval.
- 1.3.** Repair work to the aisled barn was carried out in 2001 by George Watson Limited (contractors), following the appointment of Donald Insall & Associates as conservation architect. This was not part of the Heritage Lottery funded scheme.
- 1.4.** Following discussions and negotiations with the Heritage Lottery Fund, a grant was awarded in respect of the hall repairs, with a 70% contribution from the Heritage Lottery Fund. The works commenced in September 2002 and completed in May 2003.
- 1.5.** For the landscape and park a Project Planning application for funding of the Conservation & Management Plan was submitted and granted in 2002 and based upon the recommendations of the Conservation & Management Plan an application was made to the Heritage Lottery Fund in August 2003. A grant was made for a Stage 1 Pass by the Heritage Lottery Fund on 29<sup>th</sup> March 2004. The grant is for 70% of the Development costs and 70% of the Project costs, as follows:

Project Phase	Project Cost	%	HLF contribution
Development	£328,000	70	£230,000
Construction (including Revenue contribution)	£5,739,885	70	£3,955,000

- 1.6.** Capital funding of £1.2 m was formally approved as part of the Investment Plan for CMBC's Capital Programme in Cabinet Minute B186 (19<sup>th</sup> April 2004) and Council Minute A132 (28<sup>th</sup> April 2004).
- 1.7.** Project management and design team services were appointed in September 2004 to manage the project on behalf of CMBC. The project details have been developed to RIBA Working Stage E, and form the basis of the Stage 2 submission to the Heritage Lottery Fund.

## 2. Partnership Funding

- 2.1.** Calderdale MBC is aware that funding from other bodies, in addition to the Heritage Lottery Fund, is required to ensure that the project realises its potential and takes up opportunities to extend the scope of the proposed works.
- 2.2.** Shibden Park is not located within a disadvantaged area of Halifax (Northowram & Shelf Ward) and is therefore not favourable for some funding criteria. It is however, within a mile of several wards that are regarded as disadvantaged, including one that is within the U.K. 10% most deprived areas (Park).
- 2.3.** The current submission to the Heritage Lottery Fund is based upon partnership funding between Calderdale MBC and the Heritage Lottery Fund.
- 2.4.** Further opportunities for partnership funding are being investigated in order to extend the scope of the project. In seeking opportunities for partnership funding, all the proposals, outcomes and benefits for the estate are being considered. These include education, environment, history, archaeology and local heritage. These themes recur throughout the project, as set out in the various supporting documents and plans, including:
- > Audience Development Plan
  - > Training Plan
  - > Education & Interpretation Plan
  - > Management & Maintenance Plan
  - > Business Plan
- 2.5.** As a local authority some sources of grant are not available. It is possible to benefit from such sources through a suitable voluntary or community group that is working in partnership with Calderdale MBC. The Shibden Friends Group was initiated in 2005 and provides an opportunity for community involvement in the project. In particular, Naturefriends U.K. which has been involved in Cunnery Wood improvements for several years, are active in attracting funding for environmental improvements, including landfill tax grant through Entrust.
- 2.6.** It is also recognised that Halifax, and Calderdale, has less scope for large “corporate giving” than the large Metropolitan cities that it lies between – Leeds and Manchester. Added to this is the fact that Calderdale is not eligible for EU Objective 2 funding, or that Shibden does not fall within an Single Regeneration Budget scheme or receive urban renewal monies.

- 2.7.** It is recognised that there is an opportunity for revenue funding through training and activities that can be hosted within Shibden Estate, and this source of funding is to be investigated further in the Training Plan.



## 3. Funding Opportunities

The opportunities for funding projects at Shibden are investigated below:

SOURCE	SCOPE	FUNDING PARAMETERS	Capital	Revenue
Calderdale MBC revenue allocation for play	Play provision			√
The Big Lottery Fund	Childrens play and environmental programmes	£90 million available for community spaces and enterprise	√	
The Forestry Commission	Tree planting and woodland management	New funding parameters announced July 2005		√
Countryside Stewardship Scheme:	Land management and conservation	Not appropriate for Shibden Scheme		
Sports Council	Sports related investment	Schemes for informal sports such as walking- related strategies		√
Landfill Tax	Environment improvement and conservation	Marshalls Quarries were approached at Stage 1. Further landfill contributors to be approached.	√	
Aggregates Levy Funding	Landscape and environmental improvements	As above.	√	
Action Halifax	Based on areas of deprivation in north Halifax	Unlikely to receive funding but possibility of training development of local residents in this area.		√
Transport 2000	Rural transport initiatives	Supports community projects for rural transport schemes.		√
Private finance and sponsorship	Events, business sponsorship, maintenance	Unidentified	√	√

English Heritage	Heritage projects, particular Listed Structures "at risk"	Dependent upon project details	√	
Arts Council	Arts related projects	Unidentified, dependent upon project details	√	
Calderdale Learning Partnership	Education	As set out in Training Plan		√
Historic Gardens Trust	Small Gardens Scheme	£500 limit for small gardens scheme	√	√
	Schools Orchard Scheme	Creation and maintenance of orchards involving school children		
Inside Out Trust	Labour and skills force	Products produced at cost using experienced prison workshops	√	

### 3.1. CMBC Revenue Funding of Play

Calderdale MBC has allocated £120,000 funding in respect of improving play provision to supplement the proposed play area within the Restoration Project scheme over the next 3 years (2005-8). It is proposed that this be allocated to parks in Todmorden, Hebden Bridge, Brighouse and Halifax, and £30,000 of this allocation will be used to improve play provision in Shibden Park.

### 3.2. The Big Lottery Fund

A strategic fund is available to create and improve local children's play spaces in areas of greatest need. Grants will be awarded to projects to develop, create, improve and design innovative children's play facilities.

Environmental programmes will fund improvements to rural and urban environments which communities are better able to access and enjoy. This funds a wider range of projects than the Heritage Lottery Fund parameters and is aimed at conservation and enhancement of the natural landscape with improved access. This source of funding may be appropriate for improving access within Shibden Park, particularly in areas where volunteers are active, such as Cunneery Wood.

### 3.3. The Forestry Commission

The Forestry Commission provide funding for improvements in woodlands, including infrastructure such as footpaths and planting schemes. The funding parameters were updated in July 2005 and Calderdale MBC aim to apply for funding to improve the woodland footpaths within the estate. This will provide a continuous woodland circuit throughout the park, linking the separate woodlands, and provision of interpretation and trail guide.

### 3.4. Countryside Stewardship Scheme:

This is a DEFRA scheme aims to sustain and improve landscape, wildlife habitats, archaeological sites and historic features and improve opportunities for countryside enjoyment. The scheme entails a 10 year agreement for appropriate land management and grants are available for capital works. Further investigation has found that the scheme is aimed at productive land management and it may therefore be difficult to secure an appropriate agreement in view of the public enjoyment objectives of Shibden.

### 3.5. Sports Council

Grants are available for facilities directed to support sport and recreation and aspects of healthy living may attract funding, such as using Shibden to improve people's health through walking trails.

### 3.6. Landfill Tax

The Green Business Network is the local distributor of Landfill Tax credits, both local and national such as BIFFAWARD. The aims of the funding bodies is to support projects that improve the environment and elements such as water quality improvement, landscape management and conservation issues will be considered.

### 3.7. Aggregates Levy Funding

Following its re-launch in 2004, the funding programme aims to fund projects which have a connection with the aggregates industry. This can be local quarrying, transport of materials on local roads or historical connections to the industry, and Shibden is well placed for connections to Marshalls plc, a local aggregate levy contributor. Relevant project connections include stonework repairs, stone supplies, paving, and aggregates for path surfacing.

### 3.8. Transport 2000

There is an opportunity for funding of public transport proposals through the Rural Transport initiative. However, it is unlikely that Shibden will qualify under the parameters of the scheme.

### 3.9. Individual Giving

There is an opportunity for creating a fundraising project that members of the public can contribute to. A key Government think tank has linked philanthropy to the concept of a civil society. At Shibden, philanthropic gifts could take a variety of forms, for example, donating for specific items such as trees, seats, or paving (as at Yorkshire Sculpture Park).

### 3.10. Private finance and sponsorship

The restored park and the facilities on offer to visitors will provide an opportunity for sponsorship by local businesses. Currently CMBC manage sponsorship agreements in relation to roundabouts and prominent highway sites throughout the Borough. Opportunities at Shibden include internal transport, signs and interpretation, seating and park furniture, boats and concessionaire facilities.

In addition, the Business Plan sets out the business case for the new café and visitors centre, which will provide income for the estate.

### 3.11. English Heritage

Priority is given to Grade I or II\* structures for funding provided by English Heritage. There is an opportunity to investigate the proposals for re-orientation of the Museum and arrival facilities, which are included in the Heritage Lottery Fund project. The outbuildings that comprise the Folk Museum created in the 1950s are designated Grade II\* as they are integral to the 17<sup>th</sup> century aisled barn. An important element of the HLF project is improving the arrival to the Museum, and the partnership funding for this element has not been fully identified. It is proposed that this source be investigated further, alongside Heritage Lottery funding and Museums Council funding.

### 3.12. Arts Council

Proposals such as events, exhibitions, interpretation, training and inclusive play are suitable subjects for funding through various Arts Council schemes. Links with Calderdale College will be investigated in relation to the use of

the visitors centre for exhibitions and education, such as photography and sculpture.

### 3.13. Calderdale Learning Partnership

The funding of training initiatives is to be investigated as part of the Training Plan proposals. The Conservation Skills Centre based at Calderdale College could play an integral part in attracting funding for its educational programmes at Shibden, as set out in the Training Plan.

### 3.14. Historic Gardens Trust

The Historic Gardens Trust provides a small scale funding programme which could be focussed on a discreet element of the project, such as the Paisley Shawl Garden or the orchard on the west Terraces. Links with Salter Hebble School, a local primary school, are being developed to encourage pupil involvement in the planting and maintenance of the orchard, which will grow a collection of historic regional fruit varieties.

### 3.15. Inside Out Trust

The Inside Out Trust provide skills and manpower to construct products using the Prison Service workshops. The aim is to provide relevant and useful work for inmates to improve their skills and develop self-respect. The Trust has met the Project Team and confirmed that there are a range of items that could be produced for the cost of the materials, including seating, fencing, windows, boats and plants. The Project Team is investigating the scope of work and items that could be produced by the Trust for the project. However this initiative could be extended to items outside the existing project scope, such as boats for the lake.

## 4. MANAGEMENT AND STAFFING

**4.1.** The existing Heritage Lottery Funded project is managed by the Project Co-ordinator and the Project Manager.

**4.2.** Upon the appointment of the Estate Manager, this role will be shared with the Project Co-ordinator and will be continued by the Estate Manager upon completion of the restoration project.

**4.3.** The Funding Strategy contains a number of specialist funding opportunities and it is proposed that the Project Co-ordinator will liaise with colleagues and appropriate funding officers to obtain the relevant information for the development of funding applications.

**4.4.** Decisions about match funding for any funding applications will be made by the Shibden Park Restoration Project Steering Group. Where this affects the capital or revenue budget allocation, a report will be forwarded to the Directorate Management Team and CMBC Cabinet for approval. Consultation with the Capital Appraisal Team may also be required.

## 5. CAMPAIGN

**5.1.** The seven steps to developing a fundraising strategy are:

- > Identify
- > Research
- > Plan
- > Cultivate
- > Ask
- > Conclude
- > Reciprocate

This plan is a working document that has commenced the process by identifying and researching opportunities. The next step is to plan the process of securing funding.

Actions to take generally in moving forward on the Fundraising Strategy are:

- 5.1.1. Seek high profile project champions and supporters including the media, Members of the Council, business
- 5.1.2. Investigate the advantages of appointing a fundraiser to carry out the campaign
- 5.1.3. Establish a programme of community participation and dialogue as set out in the Audience Development Plan
- 5.1.4. Create a series of awareness raising events, newsletters, website and local media for potential supporters in a high profile venue

The following Action Plan sets out the next steps for each of the identified sources of funding:

FUNDRAISING ACTION PLAN:					
SOURCE	ACTION	LEAD OFFICER/ CONTACTS	TIMESCALE	PROPOSED FUNDING	
Calderdale MBC revenue allocation for play	Confirm the allocation of funding for the Shibden Play Area. Include new match funding element in the Business Plan	John Bates Brendan Mowforth	2007/08	£30,000	
The Big Lottery Fund	Confirm eligibility Submit application	Deborah Comyn-Platt Chris Holroyd	2005/06	To be identified	
The Forestry Commission	Confirm scope of proposed scheme	Jefferson Hammond	2005	£15,000 +	
Sports Council	Investigate appropriate funding opportunities	Duncan Brundell	2006/07	To be identified	
Landfill Tax & Aggregates Levy Funding	Investigate appropriate funding opportunities	Deborah Comyn-Platt Nigel Oliver	2005/06	To be identified	
Action Halifax	Investigate training opportunities as set out in Training Plan	Shibden Estate Manager	2006/07	To be identified	
Transport 2000	Confirm eligibility	Deborah Comyn-Platt Peter Stubbs	2005	£10,000 pa.	
Private finance and sponsorship	Draw up list of sponsorship options Arrange publicity, forms and information	Deborah Comyn-Platt	Ongoing	To be identified	
English Heritage	Confirm eligibility Draw up application	Deborah Comyn-Platt Barry Sheridan	2005	To be identified	
Arts Council	Investigate appropriate funding opportunities	Museums Officer	2006/07	To be identified	
Calderdale Learning Partnership	Confirm Calderdale College capacity for education within Shibden Estate	Deborah Comyn-Platt	2005/06	To be identified	
Historic Gardens Trust	Completion application for Small Gardens Scheme. Liaise with local schools regarding orchards scheme	Deborah Comyn-Platt	2005	£1,500	

## Addendum to Action Plan

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2. Partnership Funding
3. Funding Opportunities
4. Management and Staffing
5. Campaign
6. Action Plan

The feasibility study has identified a further £80,000 which is required to complete the preferred option. CMBC are endeavouring to raise this capital by investigating various funding sources. £47,000 has been identified by CMBC as a capital contribution to the project.

Reorientation of Museum Arrival				
Heritage Lottery Fund	Await response from Heritage Lottery Fund Stage 2 submission in relation to additional funding for this scheme. Consider applying to HLF for a separate grant in respect of the Museum arrival.	Project Team	2005/6	£80,000 (additional)
English Heritage	Confirm eligibility Draw up application	Deborah Comyn-Platt Barry Sheridan	2005	As above

## 6. ACTION PLAN



