**Evaluation of the National Lottery Heritage Fund Supported Project:**

 ***‘Save the White Lion Pailton’ Heritage Project Delivery Phase 2024-26***

**Evaluation** **Framework & Planning for Delivery Phase**

**November 2023**

***A* *M*EREDITH *A*SSOCIATES**

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| **Andrew Meredith**  **A Meredith Associates**  **140 West Malvern Road, Malvern, Worcestershire WR14 4NJ**  **01684 575842**  **07941 609525**  **ameredithassociates@tiscali.co.uk** [**www.andrewmeredith.co.uk**](http://www.andrewmeredith.co.uk) |



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**1 Evaluating the Save the White Lion Pailton Heritage Project in its Delivery Phase**

**1.1 Context to the Project and its Evaluation**

The **Save the White Lion Pailton Heritage Project** is supported in its Delivery Phase by the National Lottery Heritage Fund (the ‘Heritage Fund’). The project concentrates on the delivery of a complex set of tasks around building conservation, new build, community engagement and activities to generate a financially sustainable enterprise.

The White Lion is a much loved inn, at the heart of the village of Pailton, in Rugby Borough, north-east Warwickshire. The oldest timbers of the original farmhouse structure date from the late 16th century and much of the building is 17th century, not built as a pub, becoming one in the 18th century. It is Listed Grade II and has been at the heart of its community for over 300 years. Over this time, the pub continuously changed and adapted to meet local needs, but it has retained both its architectural and social significance. There are clearly legible parts of the original timber framed structure still in place, along with evidence of former stables and domestic outbuildings. The context of the site is very much a key focal point along the village’s main street (Coventry Road). The pub is well set back from the road, with land to both the sides and rear. This established setting creates a strong visual and heritage focus for the village and its community.

The pub has, however, been closed since 2014, (following the closure of the village shop in 2008) and is in poor repair. Its condition is fragile and deteriorating – in need of a plan for restoration, so that this building, so important to the identity and history of the village, can be saved and brought back to life and good public use.

Faced with the prospect of the loss of the White Lion, Rugby Borough Council designated the building an **Asset of Community Value** in 2019. Pailton Parish Council applied for an **Architectural Heritage Fund** grant loan which contributed towards a **Viability Appraisal and Business Plan** for the project proposals. This provided a detailed set of issues, costs and potential income opportunities and operating parameters to give confidence in moving the project forward.

Pailton Parish Council, with a mandate from the community in summer 2019, secured a loan from the **Public Works Loan Board (PWLB)** to buy the pub in December 2019. Since then, the working group have carried out fundraising and development of plans to restore the pub, to celebrate its heritage and to give it a new life providing needed jobs, services and wellbeing for the community.

With the purchase of the pub, the Parish Council set up a working group, **Pailton White Lion Working Group (PWLWG)** to lead on the renovation proposals and process. PWLWG has carried out extensive community consultation to establish local residents’ priorities for what the White Lion needs to provide for the village and the local area. These community consultations have provided the Group with a very clear set of aspirations for the future of the White Lion.

In 2021 a funding application and detailed supporting documentation for the Development Phase was submitted to the **National Lottery Heritage Fund** (the ‘Heritage Fund’) through its ***Heritage Enterprise*** programme to drive the project proposals forward. Initial funding was for the Development Phase to work up detailed building designs, refine costs and meet the needs of the client and community. The total project budget, of both capital building conservation repair works and new build, plus interpretation to tell the pub’s stories and community and visitor activities and personnel to support this, was for a £1.75m Delivery Phase scheme. Of this, c£1.1m was bid for from the Heritage Fund.

However, during the detailed investigations of the Development Phase, **the costs rose to become a £2.9m scheme,** particularly due to more detailed insight into the building and cost inflation of materials and timetable extension. The application submitted in November 2023 included £2m of Heritage Fund support. Other funding bodies contribute through ongoing fundraising, alongside the PWLB loan and match funding value of many hundreds of hours of volunteer time. A successful Permission to Start from the Heritage Fund in spring 2024 will commence the Delivery Phase.

A programmed **capital works and initial activities and engagement will be undertaken from spring 2024 to autumn 2025.** Following completion of the building works and phased handover of pub, accommodation, enterprise units and other spaces to the client for operation of the multiple business and community strands, then **activities, community use and evaluation of these will continue for a minimum of the first full year, to the end of 2026/early 2027.** This will be the completion of the Heritage Fund supported phases of the project. The site will then be a free-standing community and business enterprise.

There will be **project evaluation** during the first **construction phase and off-site activities/ engagement**, reviewing the experiences of the build programme, invited audience reactions, and the construction contractor team. The impacts of the first wave of engagement and limited activities off and on-site will be evaluated.

The shop and enterprise units will be open from March 2025 and then from November 2025, with a phased **opening of the pub for wet sales and full enhanced access and public use, the evaluation will continue.** During spring 2026, the catering and accommodation will become operational. Evaluation will involve the actions and outputs of those acting as community and activity coordinators, making use of the rejuvenated facility, with a greater scope of **activities and learning programmes, as well as business trading performance** until the end of the people engagement programme, in early 2027.

**1.2 The Project’s Aims**

The Project Aims are clear statements of intent describing the project to ‘the person in the street.’ They reflect the over-arching purpose of what will be achieved by the investment. The over-arching aim of the community led project to ***“Save the White Lion is to restore and renew the building and grounds and establish a sustainable community business at the heart of our village.”***

With the Parish Council purchasing the White Lion, the project Working Group has carried out extensive community consultation to establish local residents’ priorities for what the White Lion needs to provide for the village and the local area. This has provided a very clear set of aspirations for the future of the White Lion; the plan is that the White Lion will provide:

* A community shop and post office
* A pub and café/restaurant, extending into the grounds to the side and rear
* Workspace for artisan producers and makers in the one-time Brew house and in the main building during quieter times
* Overnight/holiday accommodation on the upper floors
* Outdoor space for eating out, farmers’ & makers’ markets, wide range of community activities.

The project will *restore and convert the White Lion coaching inn, to return it to its traditional uses, a pub/ restaurant with rooms together with providing community facilities that the village and the wider area currently lack.*

*These new uses include a shop and Post Office, community meeting/leisure/social space, workspace units, co-working space, landscaped gardens, outdoor space for local produce and craft markets and a range of family activities. The White Lion will become a vibrant pub hub and once again be at the heart of community village life.*

*Unless our project succeeds, the site is likely to be sold for building development with the result that Pailton will continue to be without much needed community facilities and the heritage will be lost.*

In the funding application, the project notes it received nil visitors in the last financial year, with an expectation of seeing 65,000 visits a year on completion.

Once the project enters the three year implementation on the ground, from spring 2024 to early 2027, the evaluation of actual deliverables, relationships, engagements and impacts will commence from early on. This will be linked with the planned outputs delivered that contribute towards the outcomes, benefits and impacts that arise. The project’s overarching Aims will be set out in the regular Heritage Fund Progress Update Reports and Evaluator reviews as a constant reminder to the client project leadership about the original aspirations. These will be monitored for progress-checking during the delivery of capital and ongoing activities.

**1.3 The Project and Contributing to National Lottery Heritage Fund Outcomes**

Evaluation will monitor the impact and breadth of benefits from the investment into the project and what the team have learned through the process and how it has had a broader impact on individuals and the community. The application considers that the project will deliver successfully across all of the Heritage Fund Outcomes. It *“will transform the wellbeing of our village community, make the village a better place, provide local community services, combat isolation and create jobs.”*

Projects achieve some of the Heritage Fund outcomes more powerfully than others. All projects must significantly deliver a programme of the mandatory ***‘a wider range of people will be involved in heritage’*** outcome as a minimum. The Project Management Group is aware that the Heritage Fund through the Heritage Enterprise programme has a keenness on meeting a range of needs such as job creation, skills development, boosting the economy, and improving public wellbeing in the face of issues in current society around growing social and physical isolation.

These Outcomes, of the Heritage Fund, and the impacts of the White Lion Pailton scheme are:

**Outcomes of Investment into the Project - Heritage**

**Involving a wider range of people in heritage**

For many years no village resident has been able to visit or be involved due to its closure. We have a **diverse village with people from different backgrounds and facing different challenges** - the White Lion will be a new and unique opportunity for this wide range of people to gather together, enjoy each-others’ company and experience each-others’ perspectives.

We will **focus especially on families** – with both outdoor and indoor **facilities for families to meet** and socialise and for **children to learn about the heritage of their village** from our interpretation and heritage stories, and from **older generations informally and, more formally, at events**.

Some in the village and neighbouring countryside face challenges of **rural isolation** as they **do not have the transport or social networks** to travel to the towns and cities – for these people the White Lion will be a lifeline and a transforming difference in their lives.

Welcoming a very wide range of people to our restored pub from further away. The village sits in the **overlap of several different catchments** for our food, drink and accommodation offers, including people visiting friends and relatives and for family celebrations, others visiting the heritage and cultural attractions of Warwickshire, Coventry and Leicestershire.

**Heritage will be in better condition**

Carry out a major **overhaul of the building’s fabric** and its historic character. We will **strip back unsympathetic and detrimental l**ater additions, strip out failed modern interiors and services and **reveal and restore the historic features** and structures of the building.

**New additions and/or interventions**, for instance to meet modern standards and give universal access, will be sensitively made.

The building will be in excellent, cared for, condition that will be **maintained** over the decades to come through a detailed **management and maintenance plan** resourced **from the profits** of the Community Interest Company (CIC) owning and managing the whole site.

**Heritage will be identified and better explained**

We intend to use the hub as a focal point for the heritage of the village not just the building itself. We will do this with **artifacts and display photographs** on the walls. The building was **the village’s first Post Office** from around 1850 so there is a neat circle that brings it back to where it started.

**The Oddfellows Society** met in the first floor assembly room for over a century. We have a deed of establishment with fold out panels with the names of presidents and silk branch processional banner from them. Oddfellows provided a health insurance and funeral benefit scheme before the days of National Health Service and social security to those villagers paying in. It is entirely fitting that the building should be used again for the benefit of the community.

We would also like to have some **pictures of local people, their ancestors and their stories** – there are several families who can trace their roots back a few generations within this community. There are plenty of documented stories and pictures going back to the 19th century and it is part of our mission to **make sure the stories get told to future generations**. We have started a collection of information to use for this purpose.

**Outcomes of Investment into the Project - People**

**People will have developed skills**

The pub/hub will support local people in developing skills. During the construction stage we will write into our **procurement of the contractor a commitment to local supply chain and apprenticeships**, potentially with North Warwickshire and South Leicestershire College construction department.

In operation, we will **train volunteers**, and we anticipate that some who volunteer will use these skills gained to go on **to work with us** in other local businesses. We aim to provide a small number of trainee staff and/or apprenticeship places – chef, shop staffing, general hospitality industry service roles.

We will also provide **school and college placement** **and work experience** opportunities to local young people. This will meet a pressing need as there are currently no local opportunities and no public transport to take many of our young people to the towns and cities for such opportunities.

**People will have greater wellbeing**

Everyone’s wellbeing will improve as a result of being able to **socialise locally, being able to meet locally to shop, to eat and drink locally.** Not having to use infrequent public transport or taxis or get the car out to go out to do these things. As a result of this we will **improve the environment**, there will be less car journeys.

One of the big benefits to wellbeing will be the opportunity to have **community events and groups**, craft fairs, book clubs, a community gardening club, darts and skittles competitions, live music events in a licensed premises. There are **people in the community who feel socially isolated**, people who rarely meet anyone in their local community; they would benefit from being able to walk to local facilities, from being able to chat and catch up with people in their own community, to swap stories in the local pub over a drink or a meal. Families will **benefit from the outdoor and indoor space** to meet and socialise together with others.

For those who work in the community, they will **benefit from being able to use the hub as a co-working space,** to be able to have meetings over a drink and a meal, to be able to do this locally would benefit their wellbeing. People will benefit from being **able to pop to the shop and deli** and pick up a snack or lunch and to choose local produce, meaning less transport and therefore improving the environment. People will be able to have **somewhere for their guests to stay locally**, therefore meaning less travelling more time together and so improved wellbeing.

**Outcomes of Investment into the Project – Communities**

**The funded organisation will be more resilient**

Our work to save and now to develop the White Lion has been based throughout on the need to **produce a viable and resilient operation which delivers community benefit and is also commercially sustainable** so that it repays the borrowing we have secured to support he acquisition and development, covers its costs and develops a reserve fund, and, **if possible, produces future** **surpluses to be reinvested** in projects for the benefit of the village.

The business will be run in **four main parts: community pub; community shop and Post Office; self-catering accommodation and enterprise units**. This diversity of use responds to all the things people told us they most wanted in our community surveys and to the range of needs and priorities in a small community. It also provides a resilient model for the future as some areas (pub, accommodation) will **be more profit generating than others**, which will focus particularly on **providing community services** (the shop) and overall will provide a balanced, diversified and resilient base for the business.

Overall, the operation will be significantly strengthened in its resilience by the **expertise and experience of the Board of the CIC and by the contribution of volunteers to its operation**. In the development stage we will continue to develop the business case in detail and to test its sensitivity and response to scenarios such as pandemic, so that we are confident that it will be sustainable and resilient in the long term to continue to provide this essential community service and to fund the long term care and conservation of the building.

**The local area will be a better place to live, work or visit**

Since the last of five pubs in the village closed in 2013 and the only shop in the village closed in 2008, **our community has had very few amenities**. We have lost the heart of the village since the pub and shop closed. A new community hub to include facilities such as, bar, restaurant, deli/café, Post Office, shop and enterprise units, will **help the village become alive again.**

The village will be **enhanced by the wonderful, landscaped gardens** and beautiful tree lined entrance to the building, set back from the road, much less concrete, much better for everyone’s wellbeing, it will improve the environment in the centre of the village. **Locals can also volunteer to tend the community raised beds**; gardening is proven to improve wellbeing.

**More people would visit Pailton to use the facilities, they would be able to stay and explore** the wider area, and benefit from what Warwickshire has to offer. It would be a much more attractive village to live in and visit because of its improved appearance and the facilities it offers.

The **improved heritage offering** would be of benefit to all, both visually in the village and educationally.

**The local economy will be boosted**

The project will make a transforming difference to the local economy. Since the last shop and pub closed, there have been no small, very **local, businesses to support accessible local jobs and to generate economic activity in the village.**

The White Lion in use will **support jobs in the community** for the community, such as bar work, waiting staff, chefs, kitchen assistants, cleaners, managers, deli counter assistants, shop assistants, Post Office assistants and in the domestic support of the accommodation. Jobs will be hosted in the enterprise units.

We estimate from our business planning that we will **create more than 15 full time equivalent** **jobs** in the pub, shop, accommodation servicing and in the enterprise units – but these will be mainly part time to suit the needs of local people – and the site will likely therefore **provide new employment for more than 40 people.**

In addition, the White Lion will **support local food producers** through the use and sale of locally produced food and ingredients and farmers and local artisan makers and artists markets.

In Section 2, a structure is set out for monitoring and measuring how these outcomes, particularly the aspects highlighted in bold above, are being met during the 2024-27 funded delivery timeframe.

**1.4 Making Progress Towards the Project Approved Purposes**

Once the Delivery Phase Permission to Start is in place from spring 2024 to mobilise, the project will have its Approved Purposes specified by the National Lottery Heritage Fund. These provide the project team with the high level monitoring structure of what the whole programme is delivering, with the Evaluation to measure progress in terms of impacts and engagement, lessons learned and emerging contributions towards the Outcomes.

At the stage of this document, the formalised Approved Purposes are not known. However*, typically* for such projects they cover the range of *indicative* topics below.

**Approved Purposes - OVERALL ETHOS and CAPITAL ELEMENTS**

**Approved Purposes will not be known exactly until specified by the Heritage Fund as part of the project approval and Permission to Start in the preparations for delivery**. However, ***indicative examples*** are typically, variations upon:

* High visibility acknowledgement of the National Lottery Heritage Fund on site, online and in all activities as well as using your project to acknowledge and thank National Lottery Players
* Ensure that the needs of the community are central to processes and decision making and communication throughout
* Take proactive measures to be inclusive, remove barriers to access and reach new and diverse audiences through the delivery of this project
* Capital works to building: repair and replacement of structure, metalwork, stonework, roof, glass, rainwater goods, etc.
* Restore interior and exterior of the building, remove unnecessary clutter and enhance main entrances to the site, and its original features
* Addition of energy efficiency measures
* Ensure that the building meets the expectations and requirements of modern users
* Creation of new build works to enable operation of the site as a coherent whole
* Etc.

**Approved Purposes – ENGAGEMENT AND ACTIVITIES ELEMENTS**

***Indicative examples*** are typically:

* Delivery of specific Interpretation, physical, on site and digital for key audience segments
* Planning and delivery of specified programme of Activities and engagement with new key audience segments, on and off-site
* Development and delivery of volunteer programme and activities, increasing the number of volunteers involved
* Provision of training programme and opportunities to project staff, business operators, volunteers and the public
* Etc.

In terms of making progress towards these Approved Purposes, the Project Management Group will maintain communication with the Heritage Fund officers and project consultants from the Register of Support Services (‘ROSS’ Consultants.) A method of measuring progress is set out in Section 2 below.

**1.5 Learning from the Development Phase Experiences and Implementing Them**

As part of the previous Development Phase Evaluation, a series of lessons learned about the project approach were teased out through the ongoing discussions with the project group, from the client side and contractor team. Two ‘Project Reflections : Lessons Learned Evaluation Workshop’ were held at the close of the Development Phase, ahead of bid submission. The main areas of lessons learned carried forward into the Delivery Phase highlighted here are around project management processes and decision making mechanisms within the better defined management structure.

The mitigations presented into the Delivery Phase are essential to be followed, in order to ensure that problems are minimised. Keeping in budget and on time is a high aspiration for a project of this scale, but the lessons learned should be integrated into the project management so that the programme avoids lengthy delays and that there is capacity within the full team to strive for achieving the timetable and outputs.

Examples of **key lessons learned** to be taken forward into Delivery include:

A footballing analogy was made by one Working Group member, with a clear recognition from this Phase that there will be substantial efforts required over the next two years; *“This is the training ground, when we get the money, that’s when the match starts.”*

A major comment has been learning about the time and effort required during the Development Stage by the Working Group, and professional consultancy team – and how this will be carried on with a strong, positive working relationship – taking into the Delivery Phase. Based on knowledge of what’s taken place already, and what is coming, *“much of the Delivery Phase will require addressing things quickly, decision-making on architectural, costs and operational factors”* that will require rapid, thought through decisions because of their impacts on the next task.

*“Be open, be honest, look upward and outwards. Don’t be distracted too much by the vested interests of people telling you ‘you can’t do this, can’t do that.’ Tell the architects ‘no – YOU find the solutions.’ As clients – stick to our guns… that’s how we got our project delivered!”*

*“Question everything if you don’t understand it. Ask again, keep asking.”*

*“Changes in costs, prices, a lot more work has been needed on other scenarios to justify where we are at. Once you get closer to it, it becomes a lot more real.”*

*“It’s an unusual project, and we have to follow the Heritage Fund route to the money. The level of community engagement shows how the community is buying in to the scheme. It has been very different from May to October (2023) – more positive now, it’s becoming a real prospect.”*

By investing in the relationship both ways, and the Working Group being transparent about issues, such as the substantial rise in costs, *“a no surprises approach has made a stronger partnership – I think the Lottery appreciate that.”* *“When there’s a really big problem – be transparent – sit down, take stock, share, be open, don’t hide or walk away”* Work through the issue as a team, with the Heritage Fund, to find the solution.

The Working Group/ CIC Board have learned a lot from working with the contractors. It has boosted the volunteers’ confidence in the project and how it has minimised risks. *“A feeling of confidence given to oneself – we can talk in the villages, can stand by decisions, we haven’t ‘winged’ anything.”*

“*We’ve worked hard to create these processes – things being intense are the sign of a project going well. The community see the protracted long time as a problem – but in fact the project is actually stronger for the efforts. It’s a foundation to build the final project on.”*

Aspects such as continually revisiting the Business Plan and building evidence for trading has strengthened the figures, and minimised risk, there is a robustness from seeking comparisons with other pubs and trading profiles. *“We will look and listen to the demands, needs and audiences- and flex to the real world at the time.”*

They have sought to be *“very conservative, cautious”* about the scale of operations, income and expenditure planning. In reality, the Business Plan *“will evolve over time – it’s going in the right direction. So many unknowns will still arise.”*

The changes to the operational and completion phases of the project, with the different elements of the buildings *“it’s gone from the expectation of everything opening at once to phasing of units and opening…. A more realistic approach to work through.”* This will help better manage the spaces and provide a quality customer experience from the outset, as it is important to be successful in gaining village support rather than go too far, too fast, too early.

Even with all the community events, consultations and publicity, there is a feeling, a challenge, that some people, outside of the project group and supporters, struggle with the idea of the project and raising this much money. However, *“I predict when we have the money, so many more people will become involved, and spread awareness by word of mouth.”* For them, it is only when it becomes a construction phase reality that these members of the community will believe in what is being pursued.

Meeting the requirements of a National Lottery Heritage Fund grant criteria is demanding and complex. The team have *“learned how to communicate the complex Lottery process to the community …. And will need to do more regular communication”* in the next Delivery Phase to help the community understand issues around time lags and decision making impacts.

Looking ahead, as it is far too early for recruiting operational team members to run the site for the CIC, still 18+ months ahead, “*We as a group are really dependent upon getting the right people in to deliver our vision draw them into our culture.”*

Compared to the risks around the detailed Business Plan and operations, the Working Group feel that the building and architectural issues *“are less risk – I better understand the building and the design proposals.”*

These process/ procedural aspects of how the project team anticipates better project management in Delivery will be reviewed as part of the Evaluation monitoring.

**1.6 Taking the Theory of Change / Logic Model Approach**

Using the Good Practice Evaluation Guidance from the Heritage Fund (August 2017), a **‘Theory of Change’ (ToC) or ‘Logic Model’** illustrates the overall approach. This shows for both the Development and Delivery Phases how the proposed Outcomes arise from all the strands of building conservation, new build, trading, heritage research and sharing and audience engagement and activity work.

It sets out how the **Input components >** affect the **Actions taking place >** and the **Outputs** **delivered >** with the emerging the **short to longer term Outcomes >** having **Impacts and benefits** on the community and heritage.

The logic model outlines what the overall project interventions aim to achieve and how the impacts should cascade through the project. It considers all aspects of the project as a whole – from capital conservation through to how the local community and business relationships change, the people involved and the village’s cultural, third sector, business and resident communities.

The logic model principle is **->** **Inputs –> Actions -> Outputs -> Outcomes -> Impacts**

* **Inputs** - the financial and personnel resources involved in making the scheme happen
* **Actions** - a task, activity or action undertaken with the resources, leading to -
* **Outputs** - the planned direct product or products, often quantifiable that are delivered arising from the activity
* **Outcome** - the short to medium term effects of an activity leading to changes or benefits for the heritage asset, or individuals, groups or community involved
* **Impacts** - longer-term changes to people and the setting, that are seen as a result of the above.

It is important to differentiate between the short to long term **Project Outcomes** as set out in Section 1.3 above, which are a **result of the investment into** project **Outputs.**  The **Outcomes** are about subsequent *impacts, benefits, attitudes, changes in behaviour, etc*. related to social, heritage, community and tourism aspects – which follow from the more immediate *delivered* **Outputs**(*physical, tangible items produced, building works, or events* delivered).

It responds to the original funding application Outcomes and it should be remembered that this scheme is supported under the **Heritage Enterprise funding programme**. This has seen a more commercial, economic benefit, employment and community focused basis for the successful outcomes and impacts of the pub rejuvenation scheme. During the Delivery Phase, the Business Plan achievements, trading operations and employment will feature in the achievements.

The model in detail follows over the page.

**Save the White Lion Pailton - Logic Model Evaluation DELIVERY PHASE 2024-27**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **INPUTS (resources) at DEVELOPMENT PHASE** | **ACTIVITIES (undertake)** | **OUTPUTS (deliver)** | **SHORT TERM OUTCOMES/ IMPACTS -HERITAGE FUND OUTCOMES**  **(immediate, follow on changes)** | **MEDIUM TERM OUTCOMES/ IMPACTS**  **(emerging changes)** | **LONG TERM OUTCOMES/ IMPACTS (broader benefits)** |
| **--> leading to -->** | **--> leading to-->** | **--> leading to -->** | **Heritage Conservation, Management Learning, Awareness, Volunteering, Knowledge, Skills, Motivations** | **Action, Change Behaviour, Practice, Decisions, Policies** | **Consequences, Social, Economic, Environmental** |
| **Personnel:** Village volunteers, PWLWG, Project Manager, Architect team, Business / Activity contractors, Interp-retation, community  **Funding:** NLHF, external trusts, Parish Council reserves, others  **Investment into:** building conserve-ation repairs, new build works, grounds, ecology  **Investment into:**  Heritage learning resources, physical and digital, interpretation, community activity  More new/learning volunteering inputs  Links with groups, community, local tourism, etc. | Building conserv- ation, new builds, re-ordering, costs  Building /village archive research and memories stories shared  On/off-site events  Working with new functions/ uses / activity volunteers  Business Plan updating  Talks/ events -activities as regular heritage & community links  Developing off-site community groups with shared interest - food, gardening | Building Conserv-ation Management & Maintenance Plan, images, records  Achieve re-order-ing, layout/ new facilities  No. of community fundraising activities held  No. of heritage workshops held  No. and new type of adults/ families/ community attend/ take part  No. of events  organised offsite & audiences type/ numbers  No. of volunteers recruited/ trained / working, etc.  No. of business units / staff employed | *Heritage will be in better condition.*  – overall historic building better understand, weather proofed, in good repair for use  -systems planned for better management/eco-energy sustainability  *Heritage better identified & explained*.  -architectural/building knowledge further researched and shared  -more stories, photographs, artefacts ‘uncovered’ by local people and dialogues about stories  -community /user memories of village  *A wider range of people will be involved in heritage.*  - new insight with heritage shared to variety of current and former village community, including through online to ex-residents/ audiences  -more than just former pub users, by engaging with people interested in their ‘civic’ environment  *People will have greater well-being.*  -residents, volunteers, business supporters, any special interest groups feedback positive commentary  -feel appreciated for participating, high well-being  *People will have developed skills.*  -project management skills & audience engagement; -confidence in identifying and talking about heritage, leading community events  -leadership capacity among group and Parish Council members | *Our organisation will be more resilient.*  -increased volunteer group organisational awareness of process of developing the project  -increasing the skills and capability of team inclu- ding on Parish Council, to deliver funding applications, programme and delivery strands  *People will have learnt about heritage, leading to change in ideas and actions.*  -whilst this Outcome is not described as an achievement in the funding bid, there will undoubtedly be community changes of attitude towards the historic pub and street environment, from learning about the former pub, sharing community memories  -more volunteers come forward & be involved | *Local area will be better place to live, work, visit.*  -strong increase in local positive perception of pub and village and its heritage by local people  -raise profile of amenity to those unaware with relevant retail, Post Office, business, catering facilities.  -enhance village desirability as place to live or home-work in.  -involvement in activities’ improve the health and well-being of individuals taking part    *Local economy boosted.*  - impact of creating local employment, nearby supply chains for goods and services /activities.  -external visitor spend to pub/accommodation.  -some local trades/ building contractor links for ongoing maintenance and services |

**2 Measures of Success**

**2.1 What does Success look like for the Project?**

Linking back to the **original project Vision and Aims**, the overall measures of success may be seen slightly differently by those who are directing the project, with a greater set of aspirations; contrasted to partners supporting strands of capital, activity or engagements; or from the community, people regularly or infrequently making use of the pub, shop, café; or those specifically exploring its heritage and community stories. The overall achievements of the scheme as a whole will be examined, as well as the components that have made a difference to the building, its setting, traders and users as well as success financially as an operation will highlight what success will look like.

By the completion of the Heritage Fund supported scheme, **the project will be considered successful if it has** :

* Enhanced the former derelict pub building and its grounds as a place that is busy, and is a ‘must use’ amenity
* Attracted more and varied, existing community and surrounding area/visitors as initially new users and customers that become regular, repeat consumers, during the week and throughout the year
* Created a visible improvement to the building’s fabric layout and is more attractive and welcoming place to visit
* Created a place that the community, volunteers and the business operators are proud to work in, and positive to talk about
* Unpeeled layers of hospitality and social history and shared the pub and communities’ stories to people previously unaware
* Provided a business venue with a stronger financially sustainable operation and better appreciation of future maintenance and management needs
* Seen a breadth of partnerships and collaborations with other organisations to use the site and build community linkages.

The project delivery team as local representatives and the responsible body are the group directing the aspiration for what should be achieved, with the parameters of funding support through the National Lottery Heritage Fund, and others. The Evaluator, alongside the project team will gather and monitor progress of the indicators and evidence of success.

**2.2 Headline Measures of Success**

The headline Measures of Success include both achievement of delivered programme tasks, as well as quantitative measurable numbers of participation and engagement, alongside measurables for quality of experience, contribution to learning, wellbeing, etc. Overall, **many measures are qualitative, being about changed attitudes, feedback and perceptions.** These include:

**The Building and Project**

**Capital building conservation and renewals** work delivered on time and in budget

**Efficient project management delivery** by the Project Management Team and links with contractors

**Awards schemes’** **submission/ short listing/ accolades** to architectural, regeneration, community, retail, etc.

**Maintenance and Management Plan** instigated to enhance care for the building

**Management and condition of the building** structure/ public environment is improved

**Retention and recruitment of volunteers and staff** with new people attracted in

**Generation of renewable power/ reductions in operating costs** leading to reduced environmental operating costs / utility consumption use

**Financially balanced, sustainable business operation** – able to generate adequate income, manage costs and generate surplus for re-investment/ maintenance and repairs

**New stories revealed, shared, interpreted, displayed, archived** on site/ at partners.

**The Visitor/ Customer/ Participant Experience**

**Increase in footfall into components of the building** over time, measured against Business Plan proposals

**Feedback from users/ visitors and participants shows high levels** of enjoyment, wellbeing, learning/ understanding and inspiration

**Visitor/participant demographics** reflect the target audiences sought for activities and in general

**Increased satisfaction levels** – Ratings and commentary. Positive public reaction, media coverage, survey feedback scores for engagement and visit, social media commentary

**Increase rank position** on Tripadvisor of ‘Places to Drink/ Stay’ in Pailton/Rugby area – over time, from nil base

**New interpretation installed, and being used, read, watched, listened to** which reflects the history and heritage of the pub, village and its communities

**Positive media/social media coverage** about the building, spaces, activities and events.

**People Involved**

**Existing and new networks, partnerships** **and collaborations** developed, strengthened and continued after the funded project is completed

**Existing and new partnerships and collaborations** established as part of project **continue after** its funded phase ends

**Additional partnerships and collaborations arise** through the project

**Participants developing programmes and content** feel their ideas and contributions have been valued and included

**Varied mix of groups of people participating** in workshops, activities and events, including those that have not been involved with the project before

**New volunteers involved**, in varied roles, enjoying, learning from and benefiting from their experiences and wishing to remain involved

**Volunteers’ feedback rate high satisfaction levels**, positive views about being involved, feeling their contributions are valued, and management support their needs

**New insight and knowledge have been acquired** by Volunteers, participants and general visitors

**Staff, Volunteers, work experience placements trained**, developing new skills.

Also, as a Heritage Enterprise programme, the role of volunteers in operation of the site and the contribution to community life will be captured in the evaluation. Through the delivery of these programmes of work and engagement, the project will have positive impacts leaving long term benefits to the building’s and village’s heritage; the street setting and environmental sustainability; individual people and businesses; as well as community groups and partner interests.

**2.3 Methods of Observing some of the Methods of Success**

There will be a great number of the above measures that are recorded as quantitative numbers – of participants, attendees, contributors, footfall, scored ratings (out of 5), etc.

In addition, as will be set out in Section 2.5 following, there will also be a range of qualitative and emotion-based impacts, measured as being a result of the activity and participation.

The activities and events delivered through the project are linked to the **New Economics Foundation’s Five Ways to Wellbeing** and offer clear, practical opportunities to improve wellbeing.

**New Economics Foundation’s Five Ways to Wellbeing**

The concept of well-being comprises two main elements: feeling good and functioning well. Feelings of happiness, contentment, enjoyment, curiosity and engagement are characteristic of someone who has a positive experience of their life. Equally important for well-being is our functioning in the world. Experiencing positive relationships, having some control over one’s life and having a sense of purpose are all important attributes of wellbeing.

Evidence shows that building the five actions into our day-to-day lives is seen as important for well-being. The relevancy to Pailton White Lion can be seen through:

**Connect:** With the people around you. With family, friends, colleagues and neighbours. At home, work, school or in your local community. Building these connections will support and enrich you every day.

**Be Active:** Step outside. Exercising makes you feel good. Most importantly, discover a physical activity you enjoy and that suits your level of mobility and fitness.

**Take Notice:** Be curious. Catch sight of the beautiful. Remark on the unusual. Notice the changing seasons. Savour the moment. Be aware of the world around you and what you are feeling. Reflecting on your experiences will help you appreciate what matters to you.

**Keep Learning:** Try something new. Rediscover an old interest. Sign up for that course. Set a challenge you will enjoy achieving. Learning new things will make you more confident as well as being fun.

**Give:** Do something nice for a friend, or a stranger. Volunteer your time. Join a community group. Seeing yourself, and your happiness, linked to the wider community can be incredibly rewarding and creates connections with the people around you.

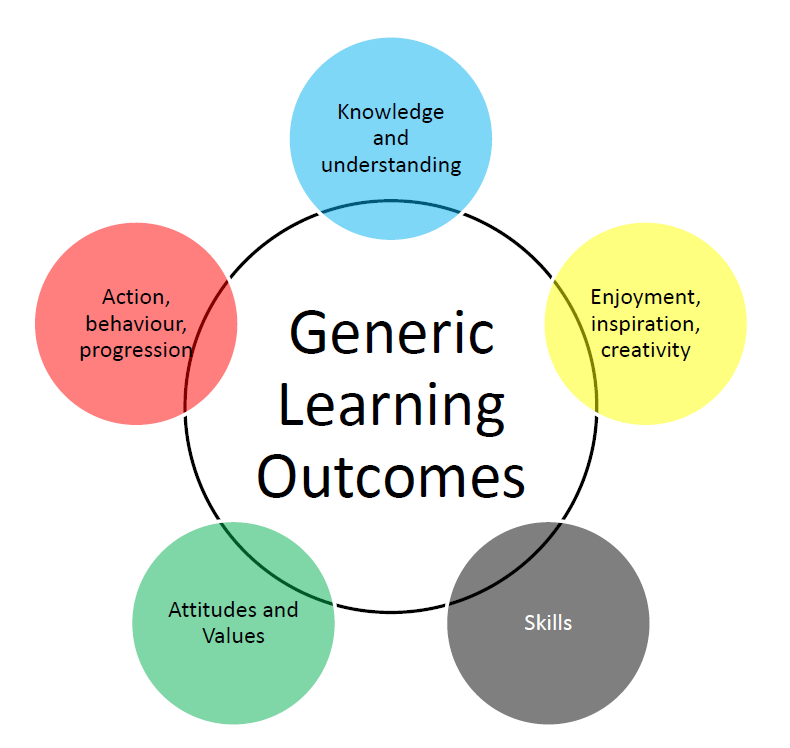
Whilst these have varying degrees of relevancy to the pub regeneration and community activities, there are some aspects, notably around **Connecting, Taking Notice, Learning and Giving/ Volunteering.** Within the project, the five measures of wellbeing will be incorporated into several elements of participant/ volunteer/ partner feedback. Questions and measures of impacts of the programme/ activity will include how far spending time in activities has contributed to increasing the outcomes of people’s enhanced wellbeing. A mix of high to low ratings and personal comments will be gathered.

For the White Lion at Pailton, the volunteer roles, activities and opportunities for social interaction will enable participants (including older people, young families and local people) to reconnect with their local community in a welcoming and safe environment. Providing the community with opportunities to become more active in the development of the key stories and interpretive themes, and learning more about the heritage of the pub while also sharing their own personal histories has and will encourage them to take time to appreciate the space around them. These will all be evidenced, at varying degrees of depth, and used to demonstrate how the project is contributing towards some of the Heritage Fund’s overall Outcomes for Heritage, People and Communities.

* The survey formats will incorporate variants of the **UCL Museum Wellbeing Measures**, ‘standardised’ which encompass scale ratings around feeling happy (by participating), feeling comfortable, enjoying the company of other people, feeling confident, etc. With younger, and school aged, participants, alternative measures will be used around being interested, inspired, feeling positive, etc.

In a similar way, also, with the more informal and formal learning opportunities, both on and off-site, the use of **Generic Learning Outcomes** will be incorporated into the activities and learning sessions that involve participants, volunteers as well as students. These will cover a range of attributes measured as previously devised for the **‘Inspiring Learning for All (ILfA)’** approach by the former Museums Libraries Archives Council (MLA).

Looking at the outcomes and impacts of learning sessions; the survey feedback, observation, anecdotes of overhead comments and reactions will encompass the five Generic Learning Outcomes pillars around:



Thus, feedback formats will capture changes in awareness, enjoyment/ satisfaction with the session, reactions to sessions/participation, specific points learned/discovered, improved skills in specific areas, motivation to do/inspired to find out more, etc.

In terms of evaluation recording, this will again be both as quantitative scaled ratings (high to low) and qualitative commentary by those involved, not only in taking part, but also by those leading and delivering sessions.

Whilst not exclusively contributing to the following four of the nine overall Heritage Fund Outcomes, these are the predominant aspects that the Five Ways to Wellbeing and GLOs themes will add insight into:

* People will have greater wellbeing;
* People will have developed skills;
* Heritage will be identified and better explained. and;
* People will have learnt about heritage, leading to change in ideas and actions.

**2.4 Targets for Delivery**

Targets for achievements are linked to the detailed Activity Statement of individual programmes, as well as the Business Plan for the ‘big picture’ performance of the White Lion as a whole as a hospitality, retail, community and visitor destination.

Measures also include those involved as numbers volunteering in management and activity delivery, working with social media etc., participants in events and learning, activities at the site and off-site.

The variety of partnerships that will be formed to further encourage skill development, and ensure sustainability and long term collaboration, and build community connections will be monitored and consulted with as part of the process. Such partnerships are expected to include those providing advice or training during production of activities, while others will be longer term partnerships with organisations delivering activities together. The partnerships included are: Oral History Society, Postal Museum, County Records Office, Pub History Society, Oddfellows Society, Re-Engage, National Hospitality Academy, Pailton Parish Hall, plus any others that build *en route.*

These figures, as yet unspecified in terms of numbers participating, will be added into the Evaluation document during 2024 delivery as the Activity Statement and Business Plans progress.

**2.5 Approach to Data Gathering**

An appropriate suite of sample surveys and templates will be provided at the start of the Delivery Phase as a separate Toolkit for project use which can be adapted by the Evaluator and refined as activity progresses. It will also include more creative methods to engage specific target groups e.g. customers, families and children.

The data-gathering approach uses a range of ‘hard’ and ‘soft’ evidence and tools. This includes: capturing footfall, attendance statistics, participation in events/ activities, types of audience, observations, recording of anecdote, responses to activities/interpretive resources. Business performance data will be supplied by the client team once the operational units are trading. It will be the client team’s responsibility to manage business performance data, sharing it to the Evaluator to challenge areas of performance.

There is some data which will be useful to collect continuously as longitudinal data throughout the entirety of the project and this relates in the main to quantitative data covering attendance/participation figures and demographics as well as useful information such as postcode analysis of customers and participants.

By creating simple, re-usable but robust data gathering tools, the limited number of staff and volunteers will be able to build evidence-gathering into daily operations. Training in evidence-gathering of visitor and participant feedback will be provided as required, particularly to engage and encourage volunteers involved in providing visitor welcome and support to activities. Some methods will be typical customer satisfaction feedback after making use of hospitality and facilities.

**2.6 Gathering Evidence - Methods**

This project looks to achieve good evaluation by blending the **quantitative evidence** (statistical performance, participation, etc.) with **qualitative** (commentary, attitudes, feedback) evaluation, along with photographs, videos, press articles, etc. Methods include surveys, questionnaires, interviews, focus groups, anecdotal evidence, observation, media analytics. The range of data to be collected includes:

**Quantitative**

• **Activity attendance figures**: bookings/attendance/ including audience/participant demographics

• **Visitor numbers**: taking part, including demographics and postcode survey

• **Record of events**: noting activity/ organised group /type of event / partnership

• **Volunteers**: numbers and profile/diversity/ new involved, number of hours

**Qualitative**

• **Participant feedback** – from community/heritage events/workshops and specific pub activities – build suite of standard/ tailored survey forms to share experiences

• **Users/ Visitors** - immediate feedback about the pub business/café / retail/ meetings establishment; as well more in-depth questioning to determine factors around response to new interpretation, local heritage environment, discovery. Tailored strands for pub/accommodation/retail experience feedback, separate from community use/activities. Customer feedback through comments postcards at key locations such as dining area, at retail counter, backed up by posters with QR code links to online survey – example images shown here:



• **Informal feedback** – visitor/participant comments, noting down anecdotal evidence, staff/ volunteer records and reflections, meetings

• **Publicity/media coverage** - of the project, immediate environment and wider presentation of the site within local / regional/ national news and specialist regeneration/pub topic online articles.

• **Digital engagement including online/social media engagement** - commentary, positive, negative likes etc and web management data on reach/ origin, Google Analytics, dwell time, etc.

• **Activity** **session leader feedback/observation** - on the different initiatives and activities

• **Volunteer feedback survey** – feedback about their experiences of the project, gaining skills, confidence, improved wellbeing etc.

• **Internal project management /stakeholders ‘Reflections workshops’** - to explore the project strengths, weaknesses, benefits, unexpected outcomes, issues around the NLHF project and process of delivering the build, fundraising, management, interpretation, learning and activities and any changed appreciation, lessons learned - what worked well, what didn't and what would you do differently next time?

• **Feedback from contractors/consultants** – views on how communication channels worked, decision making, successes, hurdles, unexpected factors (positive and negative) and lessons learned etc

• **Stakeholders or local businesses/organisations /suppliers** - Telephone/ email consultation with external businesses to better understand the physical impacts and any ripple effect economic impact benefits on the immediate heritage and tourism environment, footfall, perceptions, place to work, etc.

• **Village community/ neighbours at large**- not everyone will use the facilities – but how does the broader community view the investment onto their village? Residents and other Parish Council/neighbouring settlements

• **Photographic/video** record of activity throughout.

The following framework plan, over the page, outlines the approach to gathering evidence and data. It takes into account the building conservation, repair and new build programme as well as the Activity Statement of programmes and audiences and targets.

Discussion between the client team and Evaluator at the time will produce the exact practical toolkit resources and agreed approaches/ templates/ survey documentation/ performance indicators. This to respond to real on the ground circumstances at the time.

#### **Data Gathering Framework Plan for Delivery Phase Save the White Lion Pailton**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Purpose/ Template/ Form** | **Target/ Topic** | **When to use** | **Nature of evaluation** | **Responsibility** |
| **Excel Aggregate Recording of Numbers /Participation at Events/ Activities/ Attendances** | Ongoing numbers for Activities/ Events/ Participation etc. | Ongoing | QUANTitative numbers | Evaluator/ PWLWG |
| **Volunteers/ PC/ CIO** | Participatory feedback. Reflections. Anecdotal comments. Meeting observations etc | Ongoing | QUALitative comments | Evaluator  and Project Team |
| **Media, Digital and Traditional Performance Data** | Indication of scale of social media /web enquirers, hits, pages cross visited, downloads, etc, likes, followers, etc. Press clippings | Build from start | QUANTitative and QUALitative responses. | Evaluator and Project Team |
| **Feedback from construction contractors, consultants, partner leads** | Views of contractors and consultants and partner leaders on progress/achievement/ communications, project management/challenges/solution | Ongoing/end of build | QUANTitative nos.  QUALitative comments | Evaluator |
| **Feedback on activities by participants and activity leaders** | Views of community and volunteers/ personnel delivering the activities – satisfaction, inclusion, what/how learned, skills gained – work with community/specialists. | Ongoing | QUANTitative nos.  QUALitative comments | Evaluator |
| **Feedback on site ‘customer/visitor’ experience and new interpretation** | Views of community and visitors about the refreshed site, facilities and interpretation. | Ongoing | QUANTitative nos.  QUALitative comments | Evaluator |
| **Partner Perspectives -eg schools, groups, community societies, others externally involved/Parish Council members** | External partners’ views on project/ building/ trading/ activities delivered/ completed – review engagement, success/ hurdles/ communications, lessons learned etc | Mid and end  (ongoing) | QUALitative comments | Evaluator |
| **Other heritage /community/ regeneration/ tourism/ borough organisations** | Perspective by organisations ‘one step removed’ from delivery- views on Approach/ Impact/ Achievement/ Collaborations – by broader regen/community groups and local businesses, etc. | End project | QUANTitative nos.  QUALitative comments | Evaluator |
| **NLHF Monitor(s)** | Perspectives on the capital and interpretation/activities | Mid and end | QUALitative comments | Evaluator |
| **Project Stakeholders/ Internal /’Trustees’/ Project Team Management** | ‘Reflections’ of the procedures in place/ targets/delivery of capital & activity / delivery mechanisms/ processes/ management/achievements/ financial performance/ impact on outcomes | Mid & end project meeting | QUANTitative nos.  QUALitative comments | Evaluator |

**3 Delivery Phase – Reporting and Recording the Project Outcomes**

**3.1 Reporting the Project**

The output monitoring data and qualitative feedback aspects will feed into the evaluation reports on a regular basis. As part of ‘telling the project’s story’ the Delivery Evaluation will review the ongoing monitoring of progress towards delivering the Project’s: Aims, Approved Purposes and Outcomes.

In the earlier phases (capital works, interpretation preparations, early activities) in particular, the evaluating and focus on measures of success will help to keep a watching brief over any areas where the project may be off-track or behind on reaching key outputs and audiences.

**Targets** specific to the activity and year will be **monitored and tabulated** in each reporting document.

How the scheme is **contributing towards the Approved Purposes and Outcomes** will require a deeper analysis of the achievement and changes in perceptions, awareness, understanding, knowledge, and skills that may have taken place over time. This is structured in section 3.2 and 3.3 following.

Approach to the annual and final reporting structure:

**What we wanted to happen**

Project background

The Aims and Objectives of the project

Anticipated Measures of Success

**What has changed/been achieved?**

Evaluating the differences made and achievements

Challenges and problems experienced

What did happen – Building restoration

What did happen – Building new amenities

What did happen – Engagement, Activities & Learning collaborations

What did happen – Volunteers and Staff, Partners, co-curator collaborators

What did happen – Interpretation resources and displays

What did happen – People, Attitudes – in the pub /facilities, in the village /surrounding area

What did happen – Performance indicators, footfall, trade, income, expenditure Business Plan

**Summary of Lessons Learnt / What ifs?**

What would have happened if there had been no Heritage Fund involvement?

How would/could aspects of the project have been undertaken?

Restoration of the building processes, learning points, moving trading units in / staffing

Activities and engagement with more /different people

Interpretation - sharing of stories and media use, responses to it

**Measures of Success**

How far the original ‘list’ has been met

Perceived benefits from involvement in the scheme

Targets and achievements

Additional unexpected ‘extras’

Progress towards Outcomes and emerging impacts

Legacies and ongoing benefits.

**3.2 Dashboard Achievements/Progress against Initial Aims, Approved Purposes**

During the **Delivery Phase** a ‘traffic light’ rating system and narrative will be used to measure progress against the initial project Aims and Approved Purposes.

Green 4-5 = 4 good/ achieved/ on track. 5 completed/ performing well;

Amber 3 = in progress/ early days/ addressing issues;

Red 1-2 = 2 significant issues still to address/ limited initial progress. 1 shortfall/ opportunity lost;

= not planned to start yet/ future schedule.

White 0

Many ratings will likely blur boundaries of the scale of achievement at any time.

This will be set out for:

* Progress towards the **Project Aims** (this section)
* Progress towards the agreed Heritage Fund **Approved Purposes** (this section)
* Progress towards the short and long term impacts of the **Outcomes** (section 3.3)

The Evaluator will work with the Working Group management team and overall Project Manager to agree the ratings level being achieved for the project as a whole and its components – as capital build, activity and engagement aspects and volunteering.

With each set of interim/annual, mid point and final end of scheme reports, it is anticipated that individual elements will progress to higher levels of achievements and impact.

Once the project has received formal pass and Permission to Start, the Heritage Fund will be specific with its stated Approved Purposes that are funded and to be delivered. The approach will be along these lines below, which provide examples of typical Heritage Fund Approved Purposes, which will be confirmed and then set out in detail:

**Progress towards PROJECT AIMS at Date XX**

|  |  |  |
| --- | --- | --- |
| **Aim** | **Commentary/ issues Current Achieve:** | **1 very low to 5 very high** |
| To restore and renew the building and grounds and establish a sustainable community business at the heart of our village. | Comment….. |  |
| To restore and convert the White Lion coaching inn, to return it to its traditional uses, a pub/ restaurant with rooms. |  |  |
| Provide community facilities that the village and the wider area currently lack. |  |  |
| These new uses include a shop and Post Office. |  |  |
| Community meeting/ leisure/social space. |  |  |
| Workspace units, co-working space. |  |  |
| Landscaped gardens, outdoor space for local produce and craft markets and a range of family activities. |  |  |
| The White Lion will become a vibrant pub hub and once again be at the heart of community village life. |  |  |

***Indicative* Progress towards APPROVED PURPOSES -OVERALL ETHOS and CAPITAL ELEMENTS at Date XX**

|  |  |  |
| --- | --- | --- |
| **Approved Purposes to deliver: *INDICATIVE TYPICAL EXAMPLES – need Heritage Fund to set in Delivery Phase*** | **Current Achieve:** | **1 very low to 5 very high** |
| High visibility acknowledgement of the National Lottery Heritage Fund on site, online and in all activities as well as using your project to acknowledge and thank National Lottery Players. | |  |
| **Commentary/ issues** | | |
| Take proactive measures to be inclusive, remove barriers to access and reach new and diverse audiences through the delivery of this project. | |  |
| **Commentary/ issues** | | |
| Capital works to building: repair and replacement of structure, stonework, roof, glass, rainwater goods, etc. | |  |
| **Commentary/ issues** | | |
| Capital works to building: new build facilities, services and utilities, etc | |  |
| **Commentary/ issues** | | |
| Etc. | |  |
| **Commentary/ issues** | | |

***Indicative* Progress towards APPROVED PURPOSES- ACTIVITIES ELEMENTS at Date XX**

|  |  |  |
| --- | --- | --- |
| **Approved Purposes to deliver: *INDICATIVE TYPICAL EXAMPLES – need Heritage Fund to set in Delivery Phase*** | **Current Achieve:** | **1 very low to 5 very high** |
| Delivery of specific Interpretation with key audience segments | |  |
| **Commentary/ issues** | | |
| Delivery of specific Activities with key audience segments on and off-site | |  |
| **Commentary/ issues** | | |
| Volunteer development and training programme | |  |
| **Commentary/ issues** | | |
| Etc. | |  |
| **Commentary/ issues** | | |

**3.3 How the Delivery Phase is Contributing Towards Project Outcomes**

Theproject Outcomes as set out in detail in section 1.3 above reflect how the project’s capital works and engagement activities support the National Lottery Heritage Fund priority Outcomes. These will help to focus the Delivery tasks and benefits that can be derived for both broadening engagement and making a greater social and economic impact into the local area as part of the Lottery’s contribution towards society after the pandemic.

Within the annual reporting, the progress will be monitored against the Outcomes of the varied impacts arising from the project. The following is set out as the headline Outcomes will be delivered during the three year build and activity programme and operational trading of the Delivery Phase.

***Indicative* Progress towards OUTCOMES at Date XX**

|  |  |  |
| --- | --- | --- |
| **Outcome Heading** | **Heritage Fund Purpose** | **Commentary and Rating of Detailed Project Outcomes** |
| **Involving a wider range of people in heritage** | **Focus especially on families** – with both outdoor and indoor **facilities for families to meet** and socialise and for **children to learn about the heritage of their village** from interpretation and heritage stories, and from **older generations informally and, more formally, at events**. | Narrative to be written during project delivery |
| Some in the village and neighbouring countryside face challenges of **rural isolation** as they **do not have the transport or social networks** to travel to the towns and cities – for these people the **White Lion will be a lifeline** and a transforming difference in their lives. |  |
| Welcoming a wide range of people to our restored pub **from further away**. People visiting friends and relatives and for family celebrations, others visiting the heritage and nearby cultural attractions. |  |
| **Heritage will be in better condition** | Carry out a major **overhaul of the building’s fabric** and its historic character. **Strip back unsympathetic and detrimental** later additions, strip out failed modern interiors and services, **reveal and restore the historic features** and structures of the building. |  |
| **New additions and/ or interventions**, for instance to meet modern standards and give universal access, will be sensitively made. |  |
| The building will be in excellent, cared for, condition that will be **maintained** over the decades to come through a detailed **management and maintenance plan** resourced **from the profits** of the CIC. |  |
| **Outcome Heading** | **Heritage Fund Purpose** | **Commentary and Rating of Detailed Project Outcomes** |
| **Heritage will be identified and better explained** | Use the hub as a focal point for the heritage of the village not just the building itself. **Artifacts and display photographs** on the walls. The building was **the village’s first Post Office** from around 1850. |  |
| The **Oddfellows Society** met in the first floor assembly room for over a century. We have a deed of establishment with fold out panels with the names of presidents and silk branch processional banner from them. Oddfellows provided a health insurance and funeral benefit scheme before the days of National Health Service and social security to those villagers paying in. It is entirely fitting that the building should be used again for the benefit of the community. |  |
| Have **pictures of local people, their ancestors and their stories** –several families can trace their roots back generations within this community. Part of our mission to **make sure the stories get told to future generations**. |  |
| **People will have developed skills** | The pub/hub will support local people in developing skills. During construction stage, **procurement of the contractor a commitment to local supply chain and apprenticeships**, potentially North Warwickshire and South Leicestershire College construction department. |  |
| In operation, **train volunteers**, and we anticipate that some who volunteer will use these skills gained to go on **to work with us** in other local businesses. Aim to provide a small number of trainee staff and/ or apprenticeship places – chef, shop staffing, hospitality service roles. |  |
| Povide **school and college placement** **and work experience** opportunities to local young people. This will meet a pressing need as there are currently no local opportunities and no public transport to take many of our young people to the towns and cities for such opportunities. |  |
| **People will have greater wellbeing** | Everyone’s wellbeing will improve as a result of being able to **socialise locally, being able to meet locally to shop, to eat and drink locally.** Not having to use infrequent public transport or taxis or get the car out to go out to do these things. |  |
| **Outcome Heading** | **Heritage Fund Purpose** | **Commentary and Rating of Detailed Project Outcomes** |
| **People will have greater wellbeing** | Families will **benefit from the outdoor and indoor space** to meet and socialise together with others. |  |
| Opportunity to have **community events and groups**. There are **people in the community who feel socially isolated**, who rarely meet anyone; they would benefit from being able to walk to local facilities, being able to chat and catch up with people in their own community. |  |
| Those who work in the community will **benefit from being able to use the hub as a co-working space,** able to have meetings, able to do this locally. People will benefit from being **able to pop to the shop and deli** meaning less transport. |  |
| People will be able to have **somewhere for their guests to stay locally**, therefore meaning less travelling more time together and so improved wellbeing. |  |
| **The funded organisation will be more resilient** | Need to **produce a viable and resilient operation which delivers community benefit and is also commercially sustainable** so it repays borrowing secured to support the acquisition and development, covers its costs and develops a reserve fund. I**f possible, produces future** **surpluses to be reinvested** in projects for the village benefit. |  |
| Business run in **four main parts: community pub; community shop/ Post Office; self-catering accomm-odation and enterprise units**. Meets the community range of needs and priorities. Provide resilient model for the future, some areas will **be more profit generating than others**, which will focus on **providing community services** - overall provide a balanced, diversified, resilient base for business. |  |
| Strengthened in its resilience by the **expertise and experience of the Board of the CIC and by the contribution of volunteers to its operation. I**n the long term to continue to provide this essential community service and to fund the long-term care and conservation of the building. |  |
| **Outcome Heading** | **Heritage Fund Purpose** | **Commentary and Rating of Detailed Project Outcomes** |
| **The local area will be a better place to live, work or visit** | **Our community has very few amenities**. We have lost the heart of the village since the pub and shop closed. A new community hub to include facilities such as, bar, restaurant, deli/café, Post Office, shop and enterprise units, will **help the village become alive again.** |  |
| The village will be **enhanced by the wonderful, landscaped gardens** and beautiful tree lined entrance to the building, much less concrete. It will improve the environment in the centre of the village. |  |
| **Locals can also volunteer to tend the community raised beds**; gardening is proven to improve wellbeing. |  |
| **More people would visit Pailton to use the facilities, they would be able to stay and explore** the wider area. A more attractive village to live in and visit because of its improved appearance and the facilities it offers. |  |
| The **improved heritage offering** would be of benefit to all, both visually in the village and educationally. |  |
| **The local economy will be boosted** | The project will make a transforming difference to the local economy. Since the last shop and pub closed, there have been no small, very **local, businesses to support accessible local jobs and to generate economic activity in the village.** |  |
| The White Lion, in use, will **support jobs in the community** for the community, in the operating sections. Jobs hosted in the enterprise units. |  |
| Estimate from business planning will **create more than 15 full time equivalent** **jobs** in the pub, shop, accommodation servicing and in the enterprise units –mainly part time to suit the needs of local people. Site will likely **provide new employment for more than 40 people.** |  |
| **Outcome Heading** | **Heritage Fund Purpose** | **Commentary and Rating of Detailed Project Outcomes** |
| **The local economy will be boosted** | **Support local food producers** through the use and sale of locally produced food and ingredients and farmers and local artisan makers and artists markets. |  |
| Additionally,  **Building long term environ-mental sustain-ability into plans:** | **This was not specified in the bid** – but there are strands including the efficient use of heating, lighting, utilities, energy and building materials to lower operating costs and carbon footprint. |  |
| As a result of being able to **socialise locally, being able to meet locally to shop, to eat and drink locally** we will **improve the environment**, there will be less car journeys. |  |

As noted, this is the empty framework within which the Delivery Phase Evaluation will track the colour coded ‘traffic light’ and narrative progress made towards achieving the core and sub-Outcomes, reporting annually throughout 2024-26.

**3.4 In Conclusion**

As a Heritage Enterprise programme, the ultimate outturn is to create a vibrant, operationally sustainable mix of income streams to a community business, preserving the historic building and generating renewal in the village. Sharing learning and memories of the pub, village and life here which aid the experiences of both young and old, local and visitor, form a parallel key strand.

This project looks to achieve good evaluation by blending the quantitative evidence (statistical performance, participation numbers, etc.) with qualitative (commentary, attitudes, feedback) evaluation, along with photographs, videos, press articles, etc. The additional feedback from the on the ground community and client members will gain valuable insights into the programme and how the building restoration, creation of new businesses and broadening of audiences and methods of engaging them turns out. How the business operation strands of income and expenditure, audiences/consumers and performance will be evaluated, but the role is not of a business advisor.

Maintaining a watchful eye over progress, identifying how measures of success are being achieved and the emerging impacts and outcomes from delivering the project means that the Evaluation reporting is a dynamic and evolving document. This has a key role to inform the client team and assist the project as it moves forward.