

**East Harptree Community Benefit Society Limited**

**Business Plan  
for the  
Waldegrave Arms, East Harptree**



**November 2023**

*East Harptree Community Benefit Society Limited*

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# **“A thriving pub is as important to a community as a strong school, church & village hall.” - *village survey 2023***

## **1. Summary**

This business plan outlines how East Harptree Community Benefit Society Limited (EHCBS) could save the Waldegrave Arms pub from being closed. This will be achieved by raising the funding required to purchase the freehold and to invest in creating a sustainable community facility.

Our vision is for the Waldegrave Arms to be a vibrant food, drink, and social destination, where everyone is welcome. A local that helps village life thrive.

The implementation of this business plan will ensure the long-term survival of a business which is owned and run for the benefit of the local and wider community it serves.

East Harptree already has a history of developing and managing community assets. We have a volunteer-run community shop, a well-used village hall building supporting three local businesses and a new community arts hub. The Church has recently undergone a very significant restoration and the village playing fields association manages a children’s play area and sports pavilion supporting many community recreation groups. We have a history of sourcing pledged funding from the local community and of ongoing volunteer support for these assets.

Our business model, borrowed from other successful community pubs, will be to appoint an entrepreneurial tenant under a favourable, free-house lease. The lease terms will incentivise the tenant to ensure the needs of the local community are met and allow the pub to be at the heart of our community.

Our community pub will address many needs of our community identified in our recent survey:

- Being the only pub in the village following the demise of the village social club during the covid pandemic, it will offer an informal social gathering place outside of more organised events at the village hall or pavilion.
- It will be welcoming to all-comers. It will be a family friendly destination to encourage mixing of different generations.
- It will provide opportunities for those experiencing social isolation to engage with the community.

- An ad hoc meeting place for both formal and informal community groups, supported by ultrafast fibre broadband.
- A place to find information, share news, get involved in community activities and showcase local talent and expertise.
- It will be a source of local employment both for young people to build work experience and the wider community.
- It will provide parking for the safe drop off and pick up of school and pre-school children outside of the peak trading times for the pub.

Our Parish Council supports this project because of the importance of this issue to the community.

- The outdoor spaces will be developed by volunteers to enhance the parish Green Infrastructure Plan and the local ecology and to improve the pub's kerbside appeal.
- This project will retain and enhance the pub's Grade II listed church house heritage as part of the historic group of buildings making up the village's Core Conservation Area.
- This space could become our village electric vehicle charging area providing further customers for the pub.
- It could provide B&B rooms to create new sources of income and customers for the pub and to support local tourism.

In this way, we plan to strengthen the heart of this village with a business that supports the local economy, enhances village life and the safety of the school's pupils, and helps alleviate growing social loneliness and isolation. We have been overwhelmed with the depth and breadth of support for this project from local residents, the Parish Council, our local MP, our District Councillor and many people from the neighbouring villages. We currently have 45 volunteers who have been working hard on this project.

Through the implementation of this business plan, we will be bringing diverse groups of people together for a common cause and the community pub will substantially enhance the civic spirit in this rural Somerset village and improve the community's inclusion and resilience for the future.

## 2. Introduction

### 2.1. The importance of the Waldegrave Arms to the local community

The Waldegrave Arms is Grade II Listed and is one of the oldest buildings in the village built as a late-medieval Church House. Sited at the centre of the Core Conservation Area of the village, it has served this community as a convivial social meeting place since the 15th century. The pub has been registered as an Asset of Community Value (ACV) since 2017. This status was recently renewed by East Harptree Parish Council in 2023. The pub is the social hub of the village, widely used by a diverse range of community groups as evidenced in its ACV application.

Following the closure of the village social club during the Covid pandemic, the Waldegrave Arms is the last pub in the village. In a survey completed in July 2023 by 285 people, **89% said it was very important to have a vibrant local pub in the village** and **86% supported the effort to purchase the Waldegrave Arms**.

This business plan explains how, by purchasing the Waldegrave Arms, the community will secure this important social asset to improve the community's inclusion and resilience for all future generations.

### 2.2 Tied tenancy market overview

The traditional tied tenancy model separates the pub owner from the pub operator. The pub owner has charged high rents to generate high investment returns and has generally been slow to invest capital in the property. In addition, the tied model binds tenants to buying their alcohol and other drinks from the brewery at set prices, usually at higher prices than on the open market further eroding the financial viability of the pub for the tenant. More information on the history behind the decline in large PubCo tied tenancy models is provided in appendix C.

In the last 10 years The Waldegrave Arms has had five tenants. Three of the tenants who have left cited unattractive financial returns as a key reason for leaving.

Reflecting these trends, the current owner, Admiral Taverns, has decided to sell the freehold of the pub site which comprises 0.52 acres of land in total including a car park, garden area and two other outbuildings.

Our model, which will charge an affordable rent to a tenant with the potential to earn additional income streams from B&B rooms and loyal members, will encourage the pub to flourish as a social hub for our rural community

## 2.3 Community pubs

The community pub model is proving highly successful with 15 new community pubs opening during 2021 making a total of 146 in all. The overall survival rate remains high at 99%. (Source The Plunkett Foundation).

The first co-operative pub opened in 1988. By 2010 there were only five community pubs in the UK. Legislation in 2011 (The Localism Act) introduced the designation of an Asset of Community Value and The Plunkett Foundation, working with others in the industry, developed the co- operative pub model. Since then, the number of community pubs has grown steadily. Examples of successful community pubs nearby include the Bell in Bath (<https://thebellinnbath.co.uk/>) and the Packhorse in South Stoke, just outside Bath (<https://packhorsebath.co.uk/>).

EHCBS is a community business member of the Plunkett Foundation. We have drawn extensively on their experience and contacts to ensure that our business model draws on tried and tested practices adopted by other successful community pubs.

## 2.4 Evidence of local needs

### 2.4.1 Community survey

East Harptree parish comprises c. 300 households and 680 people. It sits in the centre of a triangle approximately 10 miles from Bath, Bristol and Wells in the Chew Valley in the Mendips Area of Outstanding Natural Beauty.

In July 2023, the Management Committee sent out a survey on the future of the Waldegrave Arms which was completed by 285 people. In this survey, 86% of respondents supported the effort to purchase the Waldegrave Arms and 89% said it was very important to have a vibrant local pub in the village. Comments from the survey included:

“A thriving pub is as important to a community as a strong school, church & village hall.”

“Every village needs a hub to meet friends, eat local food, support the wider economy, providing jobs for youngsters and a place to celebrate in groups.”

“Along with the school, nursery and shop, the pub could and should be a real asset to the community, bringing people together in a more social environment.”

The survey indicated that the community wanted:

- a pub which has a food & drink offering
- an informal social gathering place outside of more organised events at the village hall or pavilion
- a family friendly destination to encourage mixing of different generations
- a welcoming social bar area
- an ad hoc meeting place for community groups, or those 'working from home' with good connectivity
- a source of local employment both for young people to build work experience and for the wider community
- opportunities for those experiencing social isolation to engage with the wider community
- car parking to support safe drop off and pick up for school and pre-school children outside of the peak trading times for the pub. Our Parish Council supports this project because of the importance of this issue to the community.
- to retain and enhance the pub's church house heritage as part of the historic group of buildings making up the village's Core Conservation Area.
- an electric vehicle public charging area (there are none at present) providing further customers for the pub
- B&B rooms to support tourism businesses in the area and provide additional sources of revenue for the pub
- an opportunity to enhance the parish Green Infrastructure plan
- an opportunity to improve the environmental sustainability of this historic building
- Library/ book exchange
- Village events (street parties, celebrations, Christmas Carol singing)
- Evening 'locals' get-togethers
- Lunches for retired people
- Young parent and community based coffee mornings
- Quiz evenings and themed nights
- Providing a meeting place for local sports and cultural groups
- A resting place for local walking and cycling groups
- Book clubs & sewing groups
- Family-friendly spaces and early happy hours

A link to the survey results is included in Appendix A

These ideas have helped shape the project which include aspirational plans for a conversion of areas to ensuite B&B, improving family facilities, improving energy efficiency and to offer electric charging points in the car park.

#### **2.4.2 Shareholder Support**

A Community Share Offer will be launched in November 2023. Already 40% of the respondents to our survey indicated a willingness to invest and/or donate matched funding for the project.

#### **2.5 Community benefits**

East Harptree is a rural village of 680 people with an almost exact split of those designating as female and male. There is a wide demographic mix. Residents under 17 number 141 (21%) with the over 65's numbering 179 (27%) of the population, this figure is forecast to rise significantly in the next 20 years. During the Covid-19 outbreak, social isolation was identified as a significant risk and this is likely to increase as the population ages. In 2022, 49.63% of adults (25.99 million people) in the UK reported feeling lonely occasionally, sometimes, often or always (from [campaigntoendloneliness.org](http://campaigntoendloneliness.org))

Residents who face challenges and will benefit from a community focused Waldegrave Arms include those who are:

- Socially isolated
- Elderly/ less mobile
- Without access to private or public transport (the village bus route was recently cut and the Demand Responsive Transport alternative is only funded until 2025)
- Differently abled

By providing a community pub welcoming those who would not normally choose to visit a pub on their own, we believe our community will become more inclusive and supportive. Establishing the Waldegrave Arms as a community business means it will be more than simply a traditional public house. We want it to echo the Institute for Public Policy Research findings: to become 'More Than A Pub'. The intent is to offer a range of activities at the Waldegrave Arms which will reduce social isolation. It will also encourage those who would normally take the car to drive to pubs in other villages or Bristol/Bath to walk to their local.

To meet this objective EHCBS will include a management committee role dedicated to "social impact" with responsibility for working with the wider community to plan and coordinate other activities, in conjunction with the tenant, that will:

- have a positive impact on the village of East Harptree and benefit the parish and wider community

- facilitate Members in having a role and a say in how the EHCBS achieves social impact
- make a difference to customers and the community

For example, planned activities include village celebrations, parent/child coffee mornings, lunches for retired people, family friendly early happy hours, crafting groups and networking opportunities for those working from home.

Other benefits to the community that the project will provide include:

- Local employment opportunities (e.g a pool of casual labour to assist the tenant)
- Safe drop off place for EH Primary School and Pre-School outside of peak pub hours
- Safe parking for church services outside of peak pub hours
- Capital to improve the asset for the community (e.g to invest in B&B rooms, renewables and outbuildings)
- Potential for electric vehicle charging

## **2.6 Current situation**

### **2.6.1 Why is the asset at risk?**

The current owner, Admiral Taverns, operates a traditional tied tenancy model. They charge rent as well as binding the tenant into high costs for their wet sales. In the last 10 years the Waldegrave Arms has had five tenants (including the incumbents). Three of the tenants who have left cited unattractive financial returns as a key reason for leaving.

Admiral Taverns has now taken the strategic decision to sell the freehold of the pub site which comprises 0.52 acres of land in total including the main pub, a car park, garden area and two other outbuildings.

Admiral has been privately marketing the pub site for a freehold sale with or without vacant possession through an agent since February 2023 at a guide price of £595,000. Offers are being invited from pub operators and from developers. As far as we are aware, no firm offers from pub operators have materialised in the last 9 months. There is an increasing risk that any sale will be to a developer seeking change of use to build residential dwellings. Admiral is now intending to publicly market the site and officially notified the Local Council of their intention to sell the property on 19th October 2023 triggering the ACV process.

The community is concerned that a sale to a residential developer will result in the closure and ultimate loss of the pub forever. As a result, East Harptree Community Benefit Society has been set up to create the opportunity for the community to raise the funds to make its

own bid for the pub site.

EHCBS has informed Admiral's selling agent of their interest in making a community bid for the pub subject to securing funding.

### **2.6.2 Independent valuation**

A full independent valuation, condition report and assessment of Fair Maintainable Turnover has been commissioned from our RICS qualified expert, MJD Hughes Ltd. This was funded by a grant received from East Harptree Parish Council. The report confirmed that the pub is currently in poor condition and is trading well below its Fair Maintainable Turnover level.

### **2.7 Community engagement**

From the start, local people have been at the heart of this project. We came up with the idea of trying to save the Waldegrave Arms, we provided the volunteers to form an initial unincorporated community association (WACA) and establish a Management Committee and the expertise to set up a website, Facebook page, a document sharing facility and mail drop mechanism to engage the whole community. At all stages of the process the community has provided the ideas and inspiration which have formed the basis of this business plan.

A detailed Timeline of community engagement activities is included in Appendix B.

Many local volunteers have offered their expertise.

All the ideas outlined in this document belong to the community and members which promoted them. The role of WACA and EHCBS is to execute their plans.

## **3. Marketing & Communications**

### **3.1 Communication Programme**

We aim to achieve the widest possible community involvement and investment by promoting the pub as a social hub at the heart of the community: *'A vibrant food, drink, and social destination, where everyone is welcome. A local that helps village life thrive.'*

This means encouraging local residents to feel positive and confident about the plans to purchase the pub and to take a sense of ownership of the Waldegrave Arms and the project. We'll achieve this through an active and inclusive communications programme, led by a dedicated volunteer work group.

Our marketing campaign will initially create awareness and interest by emphasising the need to save the pub for our community. By showing that the pub can become a multifunctional welcoming space, serving the whole community, we'll spark the desire to act and invest in the East Harptree Community Benefit Society in order to purchase the Waldegrave Arms for the community.

### **3.2 Local businesses, groups and clubs**

We'll seek to work with local businesses, groups and clubs to raise awareness of the project amongst their customers, users and visitors. We'll achieve this by attending business networking events, distributing leaflets and posters within local businesses, and by giving talks and presentations to local groups. The proximity of East Harptree Primary School (adjacent to Waldegrave Arms), gives us a prime opportunity to raise awareness of the project and engage with parents picking up and dropping off their children.

### **3.3 Print communications**

Many of our community have taken advantage of super fast broadband but some are still reliant (or prefer) physical communications and word of mouth. For this reason, we have prioritised public meetings (advertised via our newsletter, Facebook page and on sandwich boards) and have ensured key printed materials are available as door drops and posters, distributed by local volunteers, to communicate important dates, actions and deadlines.

### **3.4 Digital communications**

We have a multi-channel digital communications approach, which includes a newsletter (Waldy Weeklyish), [Facebook page](#) and [website](#). At the time of writing, our newsletter has

227 subscribers and an average open rate of 87.9% (the benchmark across all industries was 21.5% in 2021\*).

We've designed waldegravearms.com using key Search Engine Optimisation (SEO) principles, to be easily navigable and to include project details, events, photography, FAQs and a data capture form for our newsletter. Site visitors will be able to access and download key documents, such as the business plan, share prospectus and village survey. The site has attracted 343 unique visitors at the time of writing. We have sought permission to contact people via the website and at our public meetings, in line with data protection and GDPR laws.

Our Facebook page facebook.com/waldycommunitybenefitsociety will mirror, support and enhance the print media campaign, helping to raise awareness among a more geographically diverse audience. Additional platforms, such as Youtube will help us boost interest using video. We'll post online articles (on our own, and on external digital publications) to create a continuous flow of information to keep our project front of mind.

\*[campaignmonitor.com](https://www.campaignmonitor.com)

### **3.5 Media coverage**

In the run up to the launch and during the share offer period, we aim to get coverage in print, online, radio and TV, as well as placing paid ads. We'll approach influencers, with a keen interest in rural life, such as @littlegreenshed to help us spread the word to new and diverse audiences. Examples of publications we'll target, include:

- East Harptree, West Harptree and Hinton Blewett Parish News
- Chew Magna Parish News
- Bishop Sutton Parish News
- Mendip Times
- Wells Voice
- The Midsomer Norton & Radstock Journal
- Chew Valley & Wrington Gazette
- Western, Worle & Somerset Mercury
- Somerset Guardian
- Bristol Post
- Western Daily Press
- Bishop Sutton Parish Mag
- Frome Standard

- Ubley, The Link
- The Bath Magazine
- Cheddar News
- Chew valley Gazette
- Points West
- BBC Radio Bristol
- BCfm Radio
- Heart Bristol
- Radio Somerset

We will also pitch specific marketing articles to special interest groups, such as cyclists, walkers and pub enthusiasts.

## **4. The Building**

### **4.1 The Waldegrave Arms**

The Waldegrave Arms is Grade II Listed and is one of the oldest buildings in the village built as a late-medieval church house. Sited at the centre of the Core Conservation Area of the village adjacent to the Primary School and Church, it has served this community as a convivial social meeting place since the 15<sup>th</sup> century. The pub has been registered as an Asset of Community Value since 2017.

The whole pub site comprises 0.52 acres of land in total including the main pub, a car park, garden area and two other outbuildings (a garage and stables).

The important historical context of the Waldegrave Arms is summarised in appendix D.

### **4.2 Purchase, Renovations & Improvements**

The current asking price for the Waldegrave Arms is £595,000.

EHCBS will be applying for a £250,000 capital grant from the Community Ownership Fund. Assuming this is successful, we estimate that we will need to raise further share funding of £400,000 to cover a successful bid for the pub, incidental acquisition costs, related professional fees and essential renovation works. We have not yet been able to agree a purchase price for the pub because the vendor requires EHCBS to be funded before it will negotiate a price. Hence, the target funding of £650,000 has been set by reference to our independent professional valuation of the pub, expected acquisition costs and related professional fees together with an informed assessment of the minimum essential renovations works required and a £20,000 provision for working capital. The split of these costs is being kept confidential as they may affect price negotiations with the vendor.

EHCBS will register for VAT so that VAT costs are reclaimed each quarter.

A summary of the total funds being raised under the three levels of the share offer and how they would be used is set out below:

	Minimum Offer	Optimum Offer	Maximum Offer
<b>Funds being raised:</b>	£'000	£'000	£'000
EHPC revenue grant	5	5	5
COF revenue grant	9	9	9
COF capital grant	250	250	250
Share issue	325	400	550
<b>Total funds being raised</b>	<b>589</b>	<b>664</b>	<b>814</b>
<b>Use of Funds:</b>			
Tangible fixed assets (expected acquisition costs + professional fees + minimum essential renovations)	555	630	630
Reserve for capital improvements	-	-	150
Provision for working capital	20	20	20
Non-recoverable start up costs	14	14	14
<b>Total funds used</b>	<b>589</b>	<b>664</b>	<b>814</b>

The intention would be to then create a longer term, full repairing and insuring lease on a free-house basis. The lease terms will incentivise the tenant to ensure the needs of the local community are met and allow the pub to be at the heart of our community. The lease and community vision for the pub will be advertised on the open market. An entrepreneurial tenant that shares the community vision will be appointed.

It is intended to renovate the structure to bring the pub up to a standard such that a tenant can focus on running the pub without concerns about the condition of the building when taking on a full repairing and insuring lease.

The most essential renovation works are:

- Undertake necessary structural repairs – roof, asbestos, damp etc.
- Upgrade tenant's accommodation – kitchen, bathroom, decorate etc.
- Restore outside areas and improve the curb appeal.
- Improved accessibility to be more inclusive.
- Improve basic pub facilities – kitchen improvements, boiler/heating, cellar operations etc.
- Upgrade function room for events.

We have been given access to the property by the vendor to carry out an initial assessment of the essential renovations required and have made an informed estimate of the costs involved. Those indicative costs of essential renovations will be validated by a full structural survey carried out prior to the acquisition of the pub.

Any surplus funds raised that are not spent on acquiring and renovating the freehold will be held in a capital reserve. This will be used, along with future retained profits of EHCBS, to fund capital improvements to meet the community aspirations.

Further capital improvements to meet the community aspirations for the pub include:

- Convert stables to 3 letting rooms to create additional sources of income.
- Adding extra seating capacity with a small conservatory extension to provide additional family friendly areas.
- Reconfigure kitchen, bar, cellar & function room to increase food capacity.
- Green Infrastructure plan and ecology enhancements (see Ecology Report in Appendix E).
- Renewables work (e.g. PV panels to reduce energy running costs, electric car charging etc.)
- Formal parking rights for the School.

The capital improvement works will be fully costed and implemented when sufficient funds are available. They will enhance the viability of the pub but are not necessary for the pub to operate.

Our vision is for the Waldegrave Arms to be a vibrant food, drink, and social destination, where everyone is welcome. A local that helps village life thrive. This vision offers key advantages which will put the pub in a strong position to thrive as

an economically viable and sustainable business:

1. Over time our planned capital improvements to the Waldegrave Arms will introduce additional sources of income and reduce its energy costs.
2. The Waldegrave Arms will be 'more than a pub' providing a wide range of services to the local community encouraging more local footfall.
3. The Waldegrave Arms will have the support of the EHCBS Management Committee and its members and volunteers who will regard the pub as 'their local.'

## 5. East Harptree Community Benefit Society Limited (EHCBS)

EHCBS is a limited liability community benefit society that is registered with the Financial Conduct Authority (FCA) using a set of pre-approved model rules developed by The Plunkett Foundation (a charity that has been helping communities to set up and run community owned enterprises since 1919). Almost two thirds of all existing community owned pubs use a CBS structure.

The purpose of the Society is to carry on business for the benefit of the community and the rules of the society include a Statutory Asset Lock. This ensures that, should the society achieve a surplus beyond that required to meet its liabilities, improve the facilities, and ensure the future of the business, this surplus may be made available for distribution to other community or charitable projects. Specifically, any such surplus cannot be used to benefit the Members as individuals other than for funding modest payments of interest to investors and share withdrawals.

A copy of the Rules of the Society can be accessed at the following web address showing our Financial Conduct Authority (FCA) registration <https://mutuals.fca.org.uk/Search/Society/31519> or can be accessed on our own website or requested from the Management Committee.

The Society is a democratic organisation that operates on the principle of **one Member one vote regardless of the amount each Member has invested**. Every Member has a single vote. Additionally, as a Community Benefit Society, the organisation has a responsibility to communicate with and listen to the ideas of the local community.

The Society will be a limited liability entity. This means that the most a Member can lose is the amount originally invested (though this is unlikely given that the value of the shares will be, to some extent, underwritten by the net assets of the business including the freehold property). Members would not be liable for any activities of the tenant.

## 6. EHCBS Management Structure

The members of the Management Committee will be equally responsible in law for committee actions and decisions. They will be collectively responsible and accountable for ensuring the Society is performing well, is solvent and complies with all its obligations. There will be an interim Management Committee consisting of a co-opted group drawn from volunteers currently driving the project. It is intended that this Interim Management Committee will oversee the project through to acquisition of the pub. Early in 2024 a special Members meeting will be convened to allow a new Management Committee to be elected by Members. To offer a degree of continuity during the early period of the business plan, the majority of the Interim Management Committee have committed to offer themselves for re-election if the Members so wish.

### 6.1 Management Committee responsibilities

The main responsibilities of the Management Committee are to:

- Raise the necessary funding for the purchase of the Waldegrave Arms
- Carry out any essential renovation works to the building.
- Create a lease and define the lease terms to ensure the Waldegrave Arms is operated in a manner compatible with the needs of the local community.
- Advertise for, appoint and manage the lessee tenant.
- Continue to listen to the needs of local residents and advocate ideas for improving social impact in dealing with the lessee tenant.
- Decide when and how to use any capital improvement reserve to invest in and improve the asset.
- Maintain the structure of the building.
- Produce an annual report, recommend interest payments to Members, organise the AGM and maintain two-way communication with Members and the community.
- Monitor and manage the Society's financial affairs for the benefit of the community and ensure the Society complies with all applicable regulations.

The Management Committee will set the broad policy direction for the business and agree specific standards with the tenant, including certain aspects which community feedback has shown to be important. Beyond that, however, the tenant will be left to manage and operate the business as they see fit. The Management Committee would not get involved in, or interfere with, the day-to-day running of the pub.

## 6.2 Management Committee governance

The first members of the Society are those who have signed the FCA registration. Those members will appoint the Interim Management Committee that will then serve until the first annual general meeting (or, if earlier, a Special General Meeting convened for that purpose).

The Society rules will require that all members of the first Management Committee retire at the first AGM. Every Member will be eligible to stand for election to the Management Committee by a vote of the Members. The newly elected Management Committee will take office immediately thereafter.

The Interim & Elected Management Committee will be legally responsible for running the business of the Society in the same way as a board of directors is responsible for managing the affairs of a limited company.

## 6.3 Management Committee

Here is a little about the interim management committee:

**Andrew Jones** has lived in East Harptree for 22 years. He is a chartered accountant and retired partner of Deloitte LLP where he gained expertise in finance, taxation and fundraising. He is Chair of East Harptree Parish Council and has experience of similar community projects having been involved in the establishment of the EH Community Shop. His EHCBS role is to lead the business planning and fundraising activities.

**Alan Harper** is an experienced businessman, board chairman and director. In addition to numerous industry roles, he has been chairman of the Vodafone Group Foundation – a major UK charity. He has also undertaken acquisition and refurbishment of several major listed buildings. His EHCBS role is to guide the business and financial planning and to lead the acquisition negotiations.

**Keith Bowers** is a former Naval Engineering Officer, who in his final role, was responsible for the design and delivery of the Combat System for the Type 26 Frigate. He is a Chartered Engineer and now works as a Senior Consultant and Agile Project Manager in an Engineering Consultancy. He is responsible for the delivery of multiple projects with a value of £1M. He is new to the village but keen to see a pub retained for the community.

**Daisy Thompson** has lived in East Harptree since 2017 and was drawn to the village by the beautiful walks and local pub! Formerly a full time copywriter at Saatchi & Saatchi and the

National Trust, she now balances freelance life with two unruly kids. Her EHCBS role is to lead on communications.

**Chris Head** has been the Executive Director of the charity West of England Rural Network for 13 years and has extensive experience and knowledge of the issues and concerns faced by rural communities and businesses. Chris works with other community groups, local and national government and has been involved in community activity in East Harptree for 22 years including helping to set up the Community Shop where he was chair for six years.

**Nigel Sommerfield** was born in Somerset and has lived in and around East Harptree for about 35 years. He has two adult children both born here and schooled in the village and at Chew Valley school. He worked for 20 years in marketing management and is experienced in business strategy, planning and control. He took a (very) extended career break 25 years ago to look after the kids and work on refurbishing houses here and in North Devon. This period was punctuated with spells employed as a fisheries ranger for Bristol Water working on (and sometimes in!) the local reservoirs and as a regional property manager for English Heritage. He has been a member of the East Harptree Village Hall Committee for many years.

**Phil Smith** is a 26-year-old veteran of East Harptree, with two grown up children both schooled in the village. He is a Welshman and a keen rugby supporter with two artificial knees as a legacy of his playing days. He has been involved in the Greater Bristol business scene for over 30 years and is MD of Business West, which supports thousands of local businesses to start and scale. He brings this crucial experience to EHCBS and the future of the Waldy.

**Richard Coombs** is a retired Professional Engineer, born in south Bristol before moving to East Harptree 14 years ago. He has previously owned and run an engineering manufacturing company and has been a Senior Project Manager for a large defence company. He has also been an EH Parish Councillor for eight years. As part of the EHCBS interim committee, he supports the Business Plan, Fundraising and Plunkett Engagement teams.

## **6.4 Consultants**

The Management Committee are fortunate to have access to Lee Turner who ran the Waldegrave Arms as a successful tenant for over 10 years. He has agreed to help EHCBS as an expert, pro-bono consultant.

## **6.5 Members**

Any person aged 18 or over can buy the minimum number of 100 x £1 shares in EHCBS to become a Member of the Society. Each Member has one vote to exercise at the Annual Members Meeting regardless of how many shares they hold.

Only Members can be elected to the Management Committee and any Member may stand for election. All Members will be provided with an Annual Report, which will set out details of the operation of the Society and how it has developed its activities over the previous year, and which will include a report of the accounts.

The Rules also provide for other ways in which the membership may hold the Management Committee accountable for the running of the Society, including calling a special general meeting if required.

## 7. Financials

### 7.1 Tenancy model

The merits of a manager vs a tenancy model was discussed in the June and September 2023 public meetings. There are merits to both approaches with a tenant being more entrepreneurial and professional and a manager more compliant in carrying out the community's needs.

On balance, our preference is a tenancy model combined with specific community KPIs contained in the lease against which the tenant will be measured. For example, these could include:

- Turnover and net profit targets
- Their working relationship with the Management Committee
- Satisfaction feedback surveys from customers, Members and residents
- Their support for the community at large
- Their success in implementing community events

Selecting the right long term tenant will be critical in ensuring the success and long-term future of the Waldegrave Arms. The lease terms will incentivise the tenant to ensure the needs of the local community are met and allow the pub to be at the heart of our community. The Management Committee will put the lease up for tender. An entrepreneurial tenant that shares the community vision will be appointed to make a success of managing the asset with the support of the Elected Management Committee.

Several mechanisms will be used to encourage tenant applications including:

- Advertising in the trade press.
- Personal approaches to known tenants/chefs.
- Local social media PR campaign.

The selection process will include a review of a standardised business plan which all prospective tenants will be asked to complete together with an interviewing process to ensure the tenant understands the community's vision for the Waldegrave Arms and their KPIs. Whoever is appointed will need to have the energy and enthusiasm to buy into the vision, and to contribute to its on-going development.

### 7.2 Affordable rent

There will be a separation between the ownership and operation of the pub. EHCBS will own the building and the Management Committee will support the tenant to meet and adapt to

the needs of the local community and our Members.

The rent will be affordable but realistic to give the tenant the opportunity and incentive to run a profitable business.

EHCBS will use the rental income to maintain the fabric of the building, to pay a modest amount of interest to investors and to build up reserves for capital improvements and share withdrawals. Other than any one-off grants and donations that we may receive, EHCBS's sole source of income will be the rent paid by the tenant. For the pub to succeed and be sustainable the tenant needs to make a living and have a real incentive to grow the business.

Although it will be the tenant's responsibility to determine their own business plan within the terms of their lease, we have carefully modelled what we think are reasonable assumptions of the pub's likely turnover. In addition, we have commissioned an independent, RICS qualified, valuer, MJD Hughes Ltd, to assess the fair maintainable turnover for the Waldegrave Arms and have used this as the starting point in our forecasts. A typical community pub rent is 10% of turnover which is the rent charged in our business plan. This means the amount of rent received each year will vary with trading levels.

### **7.3 Funding**

#### **7.3.1 Grants**

To date, EHCBS has received a grant from East Harptree Parish Council (£5.2k). We intend to apply for a capital (£250k) and revenue (c.£9k) grant from the Department for Levelling Up Housing and Communities' Community Ownership Fund.

A further amount of grant funding will be sought from our database of other grant making bodies. Approaches have already been made to the Architectural Heritage Fund but no further grant funding has been assumed in our forecasts.

#### **7.3.2 Share issue**

EHCBS intends to launch its share offer in November 2023 with a minimum investment of £100 and maximum limit of £50,000 per member to ensure no single individual would dominate the shareholding structure. Under the rules of EHCBS, Members will be offered a single vote per Member, no capital growth on the share value, a minimal share withdrawal facility after 3 years and, when the business is profitable, a 3% target interest rate payment at the discretion of the Management Committee.

The share offer will target a fundraise of £400,000 from the community. This, together with a £250,000 grant from the Community Ownership Fund, will enable a competitive bid to be made for the freehold purchase of the Waldegrave Arms together with related costs and

funding for essential renovations to bring the pub into a good state of repair.

The maximum fundraise from the share offer will be set at £550,000. Any surplus funds raised that are not spent on acquiring and renovating the freehold will be held in a capital reserve. This will be used, along with future retained profits of EHCBS, to fund capital improvements to meet the community needs set out in our vision.

The Share Offer will be targeted at the whole of the Chew Valley and Mendips AONB extending to Bristol, Bath and Wells, which make up the historical catchment area for Waldegrave Arms customers. From East Harptree parish alone we have already had over 100 respondents from our survey indicating a willingness to invest and/or donate matched funding for the project. The average investment per member in 146 community pub projects to date has been £1,000 (source Plunkett Foundation Community Pubs Report 2022).

This is a community funded project which has restrictions attached to it.

Funds are made available by members to the EHCBS to contribute to the purchase and development of the pub as a community asset.

If the project does well then EHCBS anticipates being able to provide a financial return to members. The level of return will be recommended by the management committee each year based on the financial results and put to the membership to decide on.

The same is the case for any members who want to withdraw all or some of their membership and “sell” shares back to EHCBS. We anticipate that a small fund equivalent to 1% of the total members funds will be available annually from the 3rd anniversary of the initial funding round. The management committee will recommend to the membership repurchase of such shares based on a first come first served policy but will also advise on out of sequence repurchase in special circumstances such as bereavement.

Therefore members should know that their shares are not immediately or generally able to be sold but may be able to be sold in the future when funds are available to EHCBS to do so.

### **7.3.3 Volunteers**

We have a database of 45 volunteers with a wide array of skills who have already agreed to work on the project and subsequent development of the building and garden.

Wherever possible we will seek contractors who will allow our volunteers to work alongside them where appropriate to reduce costs further. The cost savings of any volunteer hours are not yet reflected in our forecasts.

## Financial projections

### 7.4.1 Tenant Business Plan

The tenant's fair maintainable turnover and estimated costs for year 1 have been set at the amount assessed by our independent valuer. Turnover for subsequent years is assumed to grow at a prudent 10% p.a. (before inflation) and annual inflation has been applied to all revenues and costs. The likely level of covers and wet sales have also been modelled for the first three years as a sense-check. The results are summarised below:

Summary	Year 1	Year 2	Year 3
Av # covers per day	30	33	37
Income per cover	£25	£26.25	£27.5
Wet Sales per day	£523	£604	£680
Accommodation	0	0	0
# days trading	286	286	286
Turnover	£364k	£420k	£486k
<u>Gross profit percentage</u>	<u>65%</u>	<u>65%</u>	<u>65%</u>
Gross Profit	£237k	£273k	£316k
Tenant's rent @10% turnover	£36k	£42k	£49k
Staff wages & National Insurance	£109k	£122k	£137k
Business Rates & Insurance	£4k	£4k	£19k
Services /Utilities	£20k	£21k	£22k
Allowance for Sundry Costs	£32k	£35k	£37k
Total costs	£202k	£224k	£264k
<b>Net Operating profit</b>	<b>£35k</b>	<b>£50k</b>	<b>£52k</b>

Assumptions:

1. All costs are stated excluding VAT.
2. Maximum no. of covers in one lunch or evening session that can be catered for from the existing kitchen facility is 50 (based on discussions with past tenants).
3. Number of days trading assumes the pub is closed by the tenant on Sunday evenings and Mondays. This is based on discussions with past tenants.
4. Staff wages include a manager salary (£36k in 2025) which can be earned by the tenant instead.
5. Tenants will be charged an affordable rent of 10% of turnover p.a.
6. It is assumed that Small Business Rate Relief may be lost in 2027 so that rates become payable.
7. Inflation assumed at 5% p.a.

### 7.4.2 EHCBS 5-year Business Projections

The essential renovations of the Waldegrave Arms will be planned to limit any closure of the business to the shortest time possible in 2024.

The business projections for EHCBS for its first five full years of trading are summarised below. These show the build up of reserves for future capital improvements.

#### EHCBS Profit & Loss projection

£'000	2023	2024	2025	2026	2027	2028	2029
Rent as % of turnover	0%	0%	10%	10%	10%	10%	10%
<b>Income:</b>							
Rent			36	42	49	56	65
Insurance recharge			2	2	2	2	2
Revenue grants received	5	9					
Amortisation of grant			5	5	5	5	5
<b>Expenditure:</b>							
Repairs			7	7	7	8	8
Buildings insurance		2	2	2	2	2	2
Professional fees	3	5	5	5	6	6	6
Administration costs	2	2	3	4	4	4	5
Depreciation			13	13	13	13	13
Interest payable to members			12	12	12	12	12
<b>Profit/(loss)</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>6</b>	<b>12</b>	<b>18</b>	<b>26</b>
Corporation tax				1	2	3	5
<b>Retained profit for the year</b>			<b>1</b>	<b>5</b>	<b>10</b>	<b>15</b>	<b>21</b>
<b>Cumulative P&amp;L reserves</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>6</b>	<b>16</b>	<b>31</b>	<b>52</b>

*Note that some of the numbers are affected by rounding.*

**Assumptions:**

- a) No trading in 2024 pending purchase of pub, recruitment of tenant and renovations work. It is hoped that trading will commence sooner than this but the plan is being prudent.
- b) All figures are exclusive of VAT. EHCBS will register for VAT and pay/reclaim VAT quarterly.
- c) Interest payments targeted at 3% of share capital raised. The rate of interest paid may vary from the target of 3% but will be subject to earning sufficient profits for the year.
- d) Assumes our target £400,000 of share capital is raised.
- e) Corporation tax payable at 19% on profits and capital allowance claims equal net depreciation/amortisation
- f) An additional Community Ownership Fund revenue grant is successfully awarded to cover first year operating loss on top of the £250,000 capital grant.
- g) Depreciation and amortisation rate is 2% starting from when the pub is first brought into use.
- h) Administration costs include cost of IT, governance & communications, H&S assurance, bank fees etc.

## EHCBS Cash Flow projection

£'000	2023	2024	2025	2026	2027	2028	2029
<b>Starting cash position</b>	0	400	20	41	55	69	89
<b>Cash In:</b>							
Grants	5	259					
Share issue	400						
Rent & bdgs insur. recharge			38	44	51	58	67
<b>Total Cash In</b>	<b>405</b>	<b>259</b>	<b>38</b>	<b>44</b>	<b>51</b>	<b>58</b>	<b>67</b>
<b>Cash Out:</b>							
Purchase of Asset, incidental acquisition costs, professional fees and essential repair works		630					
Routine repairs			7	7	7	8	8
Buildings insurance		2	2	2	2	2	2
Ancillary costs	5	7	8	9	10	10	11
Interest				12	12	12	12
Corporation tax					1	2	4
Share withdrawals					4	4	4
<b>Total Cash Out</b>	<b>5</b>	<b>639</b>	<b>17</b>	<b>30</b>	<b>36</b>	<b>38</b>	<b>41</b>
<b>End Cash Position</b>	<b>400</b>	<b>20</b>	<b>41</b>	<b>55</b>	<b>69</b>	<b>89</b>	<b>115</b>

*Note that some of the numbers are affected by rounding.*

### Assumptions:

1. Share issue in November 2023 raises target £400,000 (note some funds may arise in early 2024)

2. A £20k cash buffer is maintained at the end of 2024 to deal with unexpected costs.
3. Share buy back facility starts in 2027 and capped at 1% of share funds raised
4. Any volunteer labour cost savings will be an upside
5. All figures are exclusive of VAT. EHCBS will register for VAT and pay/reclaim VAT quarterly.
6. Ancillary costs include professional fees and administration costs such as the cost of IT, governance & communications, H&S assurance, bank fees etc.

### EHCBS Balance Sheet projection

£'000	2023	2024	2025	2026	2027	2028	2029
Fixed Assets							
Freehold property		630	617	605	592	580	567
Net Current Assets/Liabilities							
Cash	400	20	41	55	69	89	115
Creditors			(12)	(13)	(14)	(16)	(17)
Long-term Liabilities							
Capital grant		(250)	(245)	(240)	(235)	(230)	(225)
Total Net Assets	400	400	401	406	412	423	440
Represented by:							
Shares	400	400	400	400	396	392	388
Reserves	0	0	1	6	16	31	52
Total Share Capital & Reserves	400	400	401	406	412	423	440

*Note that some of the numbers are affected by rounding.*

Assumptions:

1. Creditors represent members interest & corporation tax payable for the year, which are paid the following year.

## **8 Business Plan Risks**

### **8.1 EHCBS fails to raise enough money or agree a price with the vendor**

The funds required to purchase the pub, cover incidental acquisition costs and related professional fees and carry out essential repairs are planned to be raised through a combination of grants, share issues, donations and volunteer labour.

If insufficient is raised, then the project will not proceed. Grants may need to be repaid and share issue monies will be returned net of any unavoidable up-front costs not covered by non-refundable grants or donations. The management committee will do everything they can to try to minimise such costs and, even in the worst case, these should amount to no more than 3% of the monies raised.

### **8.2 Expenditure is higher than envisaged**

Repairing and maintaining a Grade II listed building will require working closely with planning authorities to obtain the necessary listed building consents. This could delay repair work and future developments and increase costs.

Our forecasts prudently allow up to a six month period to complete the immediate essential repair work. In addition we have access to a heritage expert in Dr Kevin Brown to assist with the listed building consents.

Detailed assessments of any further capital improvement projects will be made by cost consultants before such a project is commenced. No such project will be started until the Management Committee is confident that they have enough in the capital improvement reserve.

### **8.3 EHCBS are unable to appoint and keep a suitable tenant**

Running a community pub with an affordable rent and with strong community support is an attractive business proposition.

The Management Committee will adopt a thorough selection process with the advice of, Lee Turner (a past tenant of the Waldegrave Arms), other community pub groups, our pub valuer and Plunkett specialist advisors and if the tenant leaves, given the favourable business proposition, we are confident of appointing a replacement.

There is also scope to use some reserves to offer rent incentives as a further inducement to increase the number of tenants applying if necessary.

#### **8.4 The pub fails to operate at the forecast level of turnover and profitability**

Community pubs in general would expect a higher level of support than normal tenanted or managed businesses and our forecasts are conservative and based on the experience of other community pubs and expert advice. In particular our survey evidences a strong untapped demand in the community.

The management committee will regularly review progress with the tenant and a minimum rent term in the lease will ensure that a tenant who is not able to grow the turnover will consider surrendering their lease so that a new tenant can be recruited.

However, if the pub fails to trade profitably, there will not be any interest payments to Members.

#### **8.5 The pub cannot trade profitably on a sustainable basis**

The management group is taking four steps to support the economic viability of the Waldegrave Arms:

1. Over time our planned capital improvements to the Waldegrave Arms will introduce additional sources of income and reduce its energy costs.
2. The Waldegrave Arms will be 'more than a pub' providing a wide range of services to the local community.
3. An entrepreneurial tenant that shares the community vision will be selected, attracted by an affordable rent for a free-house.
4. The Waldegrave Arms will have the support of the Management Committee and its members and volunteers who will regard the pub as 'their local'.

Despite the care that has been taken in constructing the plans expressed in this document and the wide range of advice we have received from the Plunkett Foundation, other community pub groups and our consultants, there is an element of risk in any commercial venture and the pub may be forced to close. In this extreme event, the Waldegrave Arms is located in a desirable location and EHCBS would sell the property and use the balance of funds to pay back grants and Member's capital. Any surplus would then be held by EHCBS and used solely for the benefit of the community.

## APPENDIX A: Survey Results

See the link on [www.waldegravearms.com](http://www.waldegravearms.com) website.

## APPENDIX B: Timeline of Community Engagement

**March 2023** - community meeting in Waldegrave Arms (publicised by village Facebook site, East Harptree Parish Council mailing list and word of mouth. Circa.45 attendees, resulting in 9 volunteers to explore feasibility of making a community bid)

**20 March 2023** - first meeting of Waldegrave Arms volunteer working group in EH Theatre.

**3 April 2023** - Waldegrave Arms successfully re-listed as an Asset of Community Value.

**17 April 2023**- second meeting of Waldegrave Arms volunteer working group at Potts Cottage, EH.

**27 April 2023**- arranged with seller's agent for a pub site visit with surveyor

**15 May 2023** - third meeting of Waldegrave Arms volunteer WG

**15 May 2023** - officially formed Waldegrave Arms Community Association (WACA), an unincorporated association.

**2 June 2023** - arranged with seller's agent for a pub site visit with third party valuer **2 June 2023** - WACA committee meeting (Zoom)

**7-12 June 2023** - mail drop to all houses in the parish inviting them to a public meeting.

**16 June 2023** - community meeting in EH Theatre (attendees c.125 people + 30 emails of support from non-attendees + over 45 offers of time & expertise)

**16-23 June 2023** - request for community volunteers to step forward

**6 July 2023** - community volunteers meeting at EH Pavilion (c.22 attendees from c.45 volunteers & growing)

**10 July 2023** - First Survey Work Group (WG) meeting

**11 July 2023** - First Fundraising Gap WG meeting

**12 July 2023** - First Communications WG meeting

**13 July 2023** - First Business Plan WG meeting

**14 July 2023** - a Community Pub website page is created.

**15 July 2023** - Community pub stall at the EH Village Fete collecting views from the community.

**19 July 2023** - WACA becomes a community business member of the Plunkett Foundation (with a view to seeking their help incorporating a Community Benefit Society and developing a fundraising & business plan)

**24 July 2023** - a Community Pub Facebook page is created

**20-25 July 2023** - Community Survey delivered by mail drop to all houses in the parish. An online version is made available on the Community Pub website with links shared on the Community Pub Facebook page and with neighbouring villages' Facebook pages.

**26 July 2023** - Awarded grant by East Harptree Parish council to support start up feasibility costs.

**4 September 2023** – Community meeting in EH Theatre to present survey feedback and next steps.

**14 September 2023** - EHCBSLtd registered with the FCA.

**Various** - Newsletters keeping community informed

## **APPENDIX C: Tied Tenancy Market Overview**

Freehold pub values increased tenfold from 1975 to a peak in 2007 (source: Christie & Co). During much of this period large pub estates were built by pub owning companies (PubCos) using cheap debt. However, in 2007 the market ground to a halt and in recent years there has been a dramatic reversal with values falling. Much of the fall was due to the impact of the financial crisis on the PubCos who consequently have been selling assets to pay down their debt.

The decline has been accentuated by competitive pressures on drink sales and changing patterns of leisure time usage which together have put a significant strain on the traditional Led pub tenancy model. This model has become increasingly uneconomic, particularly in rural locations.

As a result of these pressures the nature of pub ownership is changing. There were 46,800 pubs in the UK (in 2020. Source: Statista) but the large estates are now being broken up and numerous properties are either being closed or being passed into the hands of individuals or small groups. It has also become clear that the traditional pub owning model has become inflexible and increasingly uncompetitive.

## APPENDIX D: Waldegrave Arms Heritage

### History

A section of the east wing of the building that now forms The Waldegrave Arms was probably built as a Church House sometime during the late 15<sup>th</sup> or early 16<sup>th</sup> centuries. These were an early form of village hall which also served as a meeting place for resident and visiting clergy. They were established as a response to developing religious ideas about the sanctity of the parish church, which previously had hosted seasonal 'church ales': communal gatherings at Holy Day feasts and festivals. The festivities involved the consumption of beer and cider, which came to be considered inappropriate behaviour in the church nave. Therefore, Church Houses were constructed for the brewing and distribution of ale during the medieval period. These were once common in the south-west of England, usually close to the church, and almost every Somerset parish had a Church House by the 16<sup>th</sup> century.

However, the brewing of church ales was increasingly frowned upon following the English Reformation and actively suppressed as a result of the rise of Puritanism in the 17<sup>th</sup> century. The role of the Church House in helping the poor was also diminished by the introduction of church rates and poor relief, and their number declined from the early 17<sup>th</sup> century. During the following centuries other uses were generally found for them as inns or dwellings, and sometimes as almshouses. But it is likely that the unnamed steward of the Church House secured the building as a hostelry in the aftermath of its suppression, thereby securing a continuous tradition of hospitality down to the present day.

Documentary sources for the Waldegrave Arms are relatively late in its long history. References to publicans and innkeepers can be found in parish registers from 1814 onwards without identifying the hostelry they kept. The parish contained several inns and beer-houses which served the working population of agricultural labourers and lead miners. The introduction and proliferation of newspapers throughout the 19<sup>th</sup> century, and the publication of trade directories from 1861 to 1935 provide numerous references to the Inn and its innkeepers.

It is likely that the name Waldegrave was adopted in the early 19<sup>th</sup> century when the estate and manor of East Harptree was acquired by the Earl Waldegrave from Joshua Scrope. The first record of its name is in a notice, placed in the Bath Chronicle dated 21<sup>st</sup> August 1829, of the marriage of the daughter of the innkeeper, Edmund Harper. Although not named in the sale particulars, it is likely that the Inn was part of the estate's property portfolio at this time because it is included subsequently in the sale of 1860, when the Countess Waldegrave relinquished the estate. The freehold was purchased by Edward Harris, a local tenant farmer who with his father sold their animals and farm equipment to acquire the Inn in 1861.

As an Inn the building would not only have sold ale but provided accommodation and stabling for those passing through the village. However, by 1902 the Waldegrave Arms is described as a Public House, suggesting that the provision of rooms had been abandoned with only stabling for horses being offered. Nevertheless, the pub continued to advertise its services to “cyclists and picnic and pleasure parties” who would be “well catered for”.

The Waldegrave Arms not only served visitors: it was an essential part of village life. As well as selling ales and liquor it served as a courtroom for inquests, an auction room for the sale of land and property and a gathering place for local clubs and societies. An Oddfellows Lodge was meeting in the Inn as early as 1844; thanks to the innkeeper, Edward Harris, for the ‘sumptuous dinner’ by its members are recorded. Another owner of the Harptree Estate, William Taylor, established a temperance society, reviving The East Harptree Friendly Society, whose members subscribed weekly and were treated annually to a meal at the Inn and festivities in the field adjoining it. Occasionally intoxication got the better of its patrons. The Cambridge Intelligence records that a meeting of the village Friendly Society ended in a fracas between two of its members; this was in 1798. Instances of drunkenness are recorded throughout the 19<sup>th</sup> century and 1899 appears to be a particularly bad year for cases tried at the Quarter Sessions. It is around this time that many of the ‘bunker’ or beer houses were stopped from selling ‘slap’ beer and shut down.

### **The Building**

The Waldegrave Arms was listed as a Grade II building for both its historic and architectural interest in 2017/18.

It was built on a former open common next to the parish church, which has late C12 origins, and forms part of the central Conservation Area along with a group of other church-related buildings, which include: The Grade II\* St Laurence Church, the Old Rectory (Grade II), Church Farm (Grade II), the Glebe Barn and 19<sup>th</sup> century Vicarage. These buildings are focussed around an open area in front of the church gates.

The building itself is of a two storey, T-plan built largely of local rubble stone with clay pantile roofs and brick stacks. Window and door openings have brick arches and architraves. The steep roof has coped verges at the gable ends. Internally, the principle structural configuration of the building is still evident, although there have been some alterations that reflect its changing use over the centuries. Nevertheless, principal structural timbers survive, including late 15<sup>th</sup>- early 16<sup>th</sup> century roof beams with collared trusses typical of this period.

The earliest part of the building is formed by the east range. Built as a Church House, it is a single bay structure with an external staircase on the south side that gives access to an upper floor: the principal church room. Below there would have been space for the brewing of the church ale and food preparation. Two chimney stacks survive, indicating the presence of fireplaces that may survive behind modern fixtures. Walls on the north and south sides

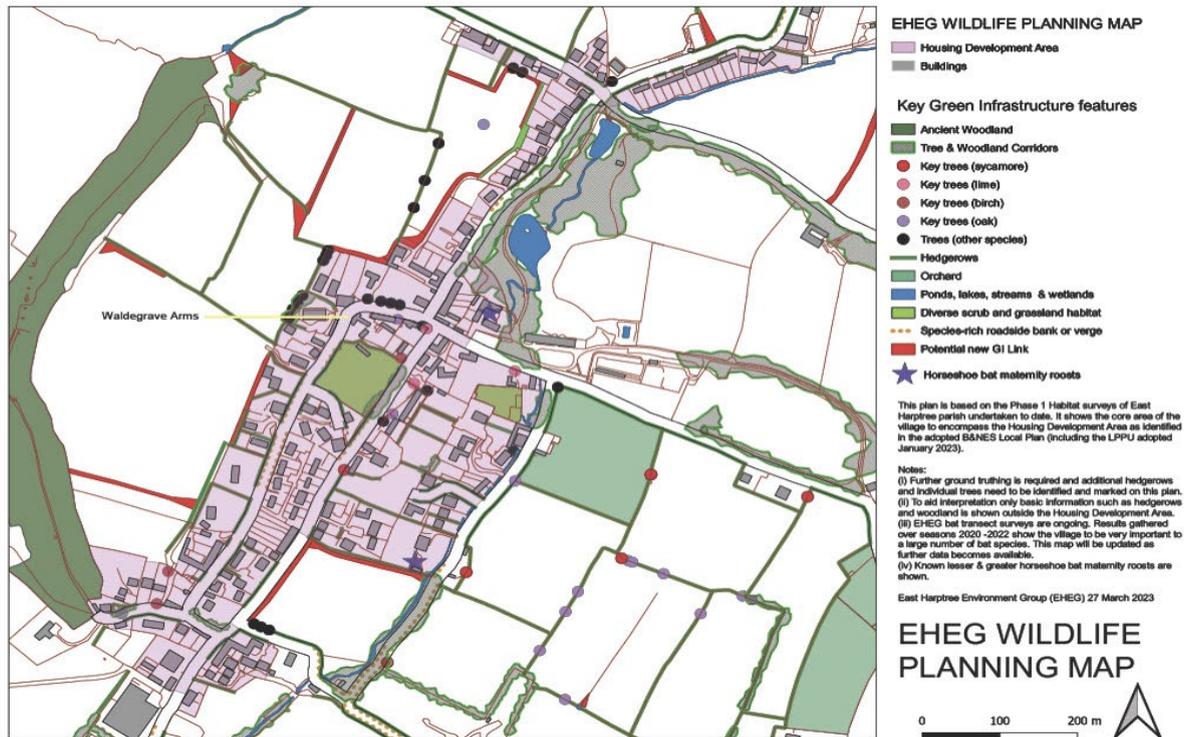
have been pierced by modern (18<sup>th</sup> or 19<sup>th</sup> century) door and window openings. The timber roof is Late Medieval.

At some point a second bay was added at the west end of the Church House, perhaps to provide accommodation for the steward. The ground floor now houses the pub kitchen, whilst the upper floor forms part of the residence. During the early Modern period a new, two storey residential block was added at right angles to the east range: its front façade possessing wide double doors to welcome passers-by either walking along Church Lane or leaving the Church immediately to the east. A blocked first storey window at the rear suggests that this wing was constructed in the late 17<sup>th</sup> or 18<sup>th</sup> century. Inside the ground floor would have once been two rooms with inglenook fireplaces at each end of the building; now one room, the fireplaces survive along with substantial chamfered supporting beams. Above, the first floor has three rooms across the front.

In the Listing advice given to the Secretary of State the comparative rarity of Church Houses was noted, whilst the evidence of continuous use as a place of hospitality was a particular recommendation in the case of the Waldegrave Arms.

Dr Kevin Brown FSA

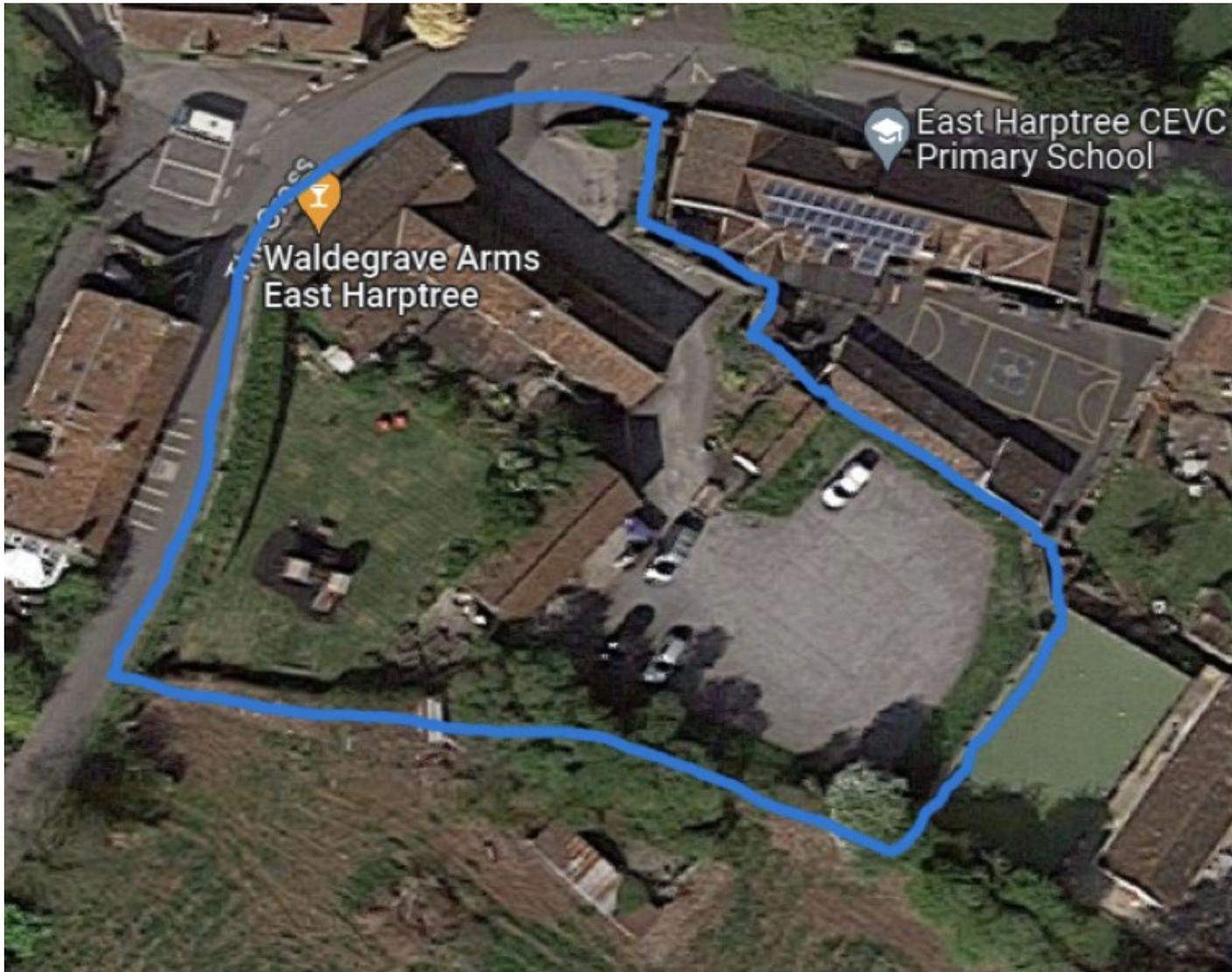




- The hedge on the southern boundary to the site is part of the existing green infrastructure of the parish. See East Harptree Environment Group map Fig 3 Fig3
- A disused ochre adit forms a sealed tunnel that runs under the existing car park.
- House martins nest under the eaves on the Church Lane elevation.
- A swift nest is located on the South gable end.
- Recent bat surveys show that 4 species of bat are active in the immediate area.

## Summary

The site is located in a rural setting with important links to the Parish Green Infrastructure and already supports a range of wildlife. It has potential for enhancement as part of the local Nature Recovery Strategy and Biodiversity Net Gain policy D5e.



### **Proposed Ecological Improvements**

1. Plant small trees in the pub garden to provide solar shading in the medium term to replace pub umbrellas.
2. Plant trees and a mixed species hedge using native species with a high wildlife value on the existing grass verge of the car park adjacent to the primary school playground, thereby providing additional solar shading for the pupils, whilst future proofing a potential link for school to access Safe Guarded Land /Green Space.
3. Remove existing turf and spread wildflower seed on the remaining grass verges to the car park to benefit pollinating insects and provide visual interest.
4. Monitor existing diseased ash trees on the southern boundary to car park and remove them when considered a hazard. Restore existing mixed species hedge currently in a bad condition and replant as necessary.
5. Restore and maintain the existing mixed hedge to the southern boundary to the pub garden.
6. Restore existing and provide additional raised beds to hard standing at the front and

side of the pub, and plant with pollinator friendly species.

7. Create a protected shallow pool water feature to encourage amphibians and to sustain other wildlife with possible daytime access for school children.
8. Install bird and bat boxes on the building façade and on the boundary trees.
9. Regulate light spillage from the site with choice of light fittings and timing controls for the two pub signs on the building.
10. Create log pile refuges and bug hotels in low trafficked areas of car park southern border.
11. Explore the potential use of the ochre adit as a wildlife habitat.

### **Cost Estimates of proposed Ecological improvements**

Notes;

- All labour costs would be covered by volunteers unless otherwise stated i.e. potential tree surgery.
- Does not include the cost of any Ecology Survey that may be require as part of Listed Building Consent

	Feature	Pricing Notes	Totals	Volunteer Hours	Value at £10/hr
1	4no small standard trees and stakes	£90 each	£360	8	£80
2	4no small standard trees and stakes, 20m mixed variety hedge whips, canes and spirals	£90 each for trees, say £300 for hedge	£660	40	£400
3	30m <sup>2</sup> of wild flower seed	£15	£15	32	£320
4	4no small standard trees and stakes, 10m mixed variety hedge whips, canes and spirals	£90 each for trees, say £150 for hedge	£510	35	£350
5	No materials	n/a		32	£320
6	Timber raised beds/planters and planting	Say 20 no 2.4m x 300mm x 100mm treated s/w sleepers at £35 each. Plants	£700	45	£450

		sourced from local gardens			
7	Shallow pool water feature fed by downpipe	Pebbles and liner	£50	16	£160
8	Total 8no bird/bat boxes	Say £40 each for Woodcrete ones	£240	16	£160
9	LED Spotlights and controls if none existing	Not high priority			
10	Locally sourced materials	n/a		16	£160
11	Unknown at this stage				
	<b>TOTALS</b>			<b>£2,535.00</b>	<b>£2,400</b>