# **East Harptree Community Benefit Society Limited**

# Community Engagement Plan for the Waldegrave Arms



16 June 2023 Public meeting held in East Harptree Theatre

#### January 2024

East Harptree Community Benefit Society Limited is registered with the FCA as a Co-operative and Community Benefit Society No. 9144

#### THE WALDEGRAVE ARMS COMMUNITY ENGAGEMENT PLAN

Community engagement is critical to the success of The Waldegrave Arms project. As an interim committee, we've already taken many steps to engage the community in safeguarding the pub, from, securing the Asset of Community Value listing for the pub in 2017, to holding community meetings and undertaking a survey to understand the opinions and needs of the community, when it comes to a village pub that serves everyone.

Our accompanying Business Plan outlines how East Harptree Community Benefit Society Limited (EHCBS) will keep the Waldegrave Arms for the community. This will only be achieved with the support and engagement of the community by raising the funding required to purchase the freehold and to invest in creating a sustainable community-owned facility and through its continued use of and support for the pub.

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.

Implementing this community engagement 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 community owned shop that has been running for over 14 years; a well-used village hall building (supporting three local businesses) and a new community arts hub; the village church has recently undergone a very significant restoration supported by the Heritage Lottery Fund; the children's play area in Townsend was also fully upgraded in 2018 thanks to the fundraising efforts of the village; a substantial new sports pavilion was constructed from local funds, as well as funds from East Harptree Parish Council.

East Harptree is a community that never hesitates to pull together and respond, helping to fund and providing ongoing volunteer support for the facilities that contribute to a thriving village life and we believe the village pub is a venue that will once again, do just that.

Our business model, based on 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 ambitions of the local community are realised, placing the pub at the heart of our community.

The sustainable rental income from the tenant will enable EHCBS to fund interest payments to, and share withdrawals by members, whilst also building reserves to properly maintain and

improve the structure of the building, and to fund our community action plan to deliver tangible social impact to our community."

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 65s numbering 179 (27%) of the population. This latter figure is forecast to rise significantly in the next 20 years. Further details of the Parish from the 2021 Census are contained in the Annexe to this plan.

### **Community benefits**

#### **Countering Ioneliness and isolation**

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)

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

- Socially isolated (including those who are single/widowed/living with a mental health condition)
- Elderly and 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)
- People with protected characteristics

By providing a community pub that welcomes those who would not normally choose to visit a pub on their own, we believe our community will become more inclusive and supportive.

#### Offering a range of events and activities

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

Following suggestions from the community survey, planned activities include:

- village celebrations
- parent/child coffee mornings
- lunch clubs 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 East Harptree 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

The community survey demonstrated high levels of engagement and offered some feedback for consideration that will be incorporated into our plans for both the initial set-up and ongoing development of the day-to- day operations.

In addition, we have engaged with the community on an ongoing basis throughout the project so far. The detailed timeline is included in the Annexe to this plan but have included:

- Delivery of flyers and survey to every household in the communities of East Harptree
- Two community meetings and presentations on project progress so far for the community at the local village hall
- Regular newsletters to an established list of people who want to be kept informed

#### **Promoting the Community Share Offer**

The Community Share Offer will be launched in the second half of November 2023 and we will be undertaking a number of activities and events to support this process. Our aim is to promote the purchase of shares within the local village area and further afield. Activities planned are as follows:

- Share Offer invitation hand delivered to every address in East Harptree
- Launch of share offer on 'The Waldegrave Arms' website with options for document and application form downloads
- A low entry minimum share purchase threshold of £100 to optimise participation
- The ability to buy shares as a syndicate making group purchasing accessible
- Widespread promotion of the share issue through our Facebook site and social media platforms
- 'Proposal to Bid and Share Offer Launch' presentation at East Harptree Village Hall the week following delivery of share offer invitation. We will have copies of the Share Offer Prospectus and Business Plan to hand.
- A visible totaliser in the village to show progress
- Engaging village interest groups and informal community groups by supplying key message materials
- Informal drop-in sessions throughout December, January and February to further understanding and to take on-the-spot investments
- Attendance at community events in the village hall where we will have a stall and promote the share issue
- Supplying articles for local Parish Magazine
- Reaching out to the local newspaper press Chew Valley Gazette, Mendip Times and Somerset Guardian and other local press, print and broadcast media referred to in the business plan through a coordinated programme of press releases and interaction
- Promotion through local radio and TV

Further and continuing community engagement is a key component to the success of the project overall and we aim to develop this further in the coming months and years ahead. Plans and timings will inevitably change over time in response to the business challenges we will face and the anticipated growth over the next 2-3 years and beyond.

#### The Community Engagement Plan

In developing our Community Engagement plan we have followed the following three principles;

**CONSULTING** - We have already asked for opinions, needs and ideas from our community and will continue to do so

**INFORMING** - We understand that engagement means communicating ideas and plans with our community in a dialogue

**ENGAGING** - We will be responding to what our community says, actively involving them in an agreed plan

Based on our consultation and survey to date we have set out some key community focused aims for the next 12 to 24 months. The sections on the following pages outline 5 initial community areas that we will be focusing on and the governance and reporting that will be put in place.

#### 1. Enabling the community to bring about change

The purchase of The Waldegrave Arms as a community venture will be a hugely significant event in the village. It will demonstrate the power of the community to change things that matter to them, and to preserve them for future generations. Taking ownership of The Waldegrave Arms will endow the community with the confidence, enthusiasm, skills, knowledge and wherewithal to take action and reverse the trends of the 'short term' pub tenancy route and multiple owners of the last 10-15 years.

Having the power and ownership in our own hands, along with the support of professionals in the pub trade and a strong management team, will enable decisions to be made for the benefit of a much wider group of people.

#### Target Group;

- Residents living in East Harptree, including the hamlets of Shrowle, Eastwood and Coley.
- Residents of surrounding communities outside the parish such as West Harptree, Hinton Blewett, Litton and Priddy
- Older people or people with limited mobility
- Younger adult members of the village who have limited meeting facilities locally and employment opportunities.
- People with protected characteristics

#### Outcome / Benefit;

- Reducing social isolation
- Improving mental health and wellbeing
- Increasing employability
- Creating better and easier access to basic services
- Enabler for community cohesion
- Foster community pride and empowerment
- Investment in the asset or the wider benefit of the community
- EHCBS could distribute surplus to community projects supporting community cohesion

#### Monitoring;

It is planned that basic monitoring will begin immediately that aims to steer the direction of the pub. Data collected will include the number of shareholders (investor community) and approximate number of users of the pub when acquired. This will be reported periodically and provided to the EHCBS management committee. Reports will be in summary form as part of the quarterly / annual report and financial statements. Critically, the data will be used to measure the performance of the pub and its management team.

#### Timing;

Starts immediately on acquisition of the pub and will be adjusted over time as the pub is reestablished.

#### 2. Providing a place to socialise

Acquiring and then re-opening the pub is the first priority and we would seek a tenant that will provide an accessible space for a range of services and activities for the many elderly residents and those living alone. Our consultant, Lee Turner, will help to identify practical services that make a difference and are viable for the tenant. A range of services and activities may include; access to the internet through free Wi-Fi, low-cost lunches with elderly concessions using funds from EHCBS (on certain days or during certain promotions / events), comfortable seating and a quiet area to read and talk with friends whilst enjoying a drink.

In addition, we would expect other community groups and sports clubs both formal and informal to use the pub for meetings, events and social activities. We expect these plans to develop over time under the guidance of the Management Committee's Social Impact champion.

#### **Target Group**

Residents living in East Harptree

- Residents of surrounding communities outside the village
- Older people or people with limited mobility
- Sports and social clubs
- Groups

#### Outcome / Benefit

- Reducing social isolation
- Improving health and wellbeing
- Creating better access to basic services
- Enabling greater community cohesion

#### Monitoring

Monthly usage reports will be kept as well as feedback from pub customers. The Social Impact Champion will report regularly to the EHCBS management committee and will liaise with the Pub Tenant.

#### **Timing**

As the pub finds its feet and re-establishes the basic pub services, including the provision of food and drinks, these additional services will be added at a time that the tenant is confident that they can be provided at a suitable standard. We envisage that these services will become a key part of the running on the pub by the end of the first year and subject to development thereafter in accordance to user feedback.

#### 3. Local Business Hub

An aspiration we would expect to see reflected in the Tenants plan is to establish a business hub as a response to the change in working habits (2021 Census shows 51% of people work from home in East Harptree against 31% in England) and behaviour post pandemic. This will include basic services and support and could include;

- High speed quality wi-fi, free for users of the pub
- Printing facilities
- Comfortable work area away from the pub bar and restaurant
- Meeting space that can be booked for business meetings / events
- Possibly monthly self-employed Friday socials/networking

Depending on the success and usage of the business hub, other IT and support services will be added to broaden its appeal and scope.

Opportunities will be taken to explore the options for support and training of older individuals

in the village community who wish to learn new IT skills and gain confidence in using social media and smart devices

#### **Target Group**

- Residents living in East Harptree
- Local clubs and societies
- Older people or people with limited mobility

#### Outcome / Benefit

- Reducing social isolation
- Increasing employability
- Creating better access to basic services
- Supporting local businesses, start-ups and the rising population of home workers

#### Monitoring

All usage will be monitored / recorded and a simple booking system will be used to record meetings held, facilities booked and services utilised. This will be reported to the management committee and pub tenant. A summary will be shared back to the community and investor group through the governance meetings and AGM.

#### **Timing**

Basic services will be available from day 1 of opening including wi-fi. Additional services will be added and we expect the business hub to be fully operational early in the second year of trade.

#### 4. Volunteering

The benefits of volunteering on community projects are well known and we have been including the ability to volunteer in this project from the outset. We recognise that the volunteering roles will change at different stages of the project but EHCBS will be embedding this as a significant part of our community engagement plan.

Volunteering could range from administrative tasks within the governance structures through to practical tasks such as maintenance and landscaping, through to events and function organisation. EHCBS would be looking to ensure that the incoming tenant shared our aspiration for volunteering and understood the social impact that followed from engaging with volunteers.

#### **Target Group**

Residents living in East Harptree

- Young people
- People wanting to return to work
- Older people

#### Outcome / Benefit

- Reducing social isolation
- Improving health and wellbeing
- Work experience and skill development
- Building confidence and health benefits
- Enabling greater community cohesion

#### Monitoring

The EHCBS Social Impact champion would monitor the number of active volunteers and would report annually to the AGM and liaise with the Pub Tenant.

#### **Timing**

Volunteers are already significantly involved in pulling together plans, we are monitoring this involvement and we will build on this by developing this Community Engagement plan.

#### 5. Wider community stakeholders

In addition to traditional food and drink customers the Waldegrave Arms as a physical structure and meeting place has links into other groups or communities of interest that exist across East Harptree and the wider Chew Valley. This ranges from the historical aspects of the building; its ecological importance and potential (there are Swift nests in the building); as a place of performance (musical and spoken word); and as a neighbour to the village primary school who have used the car park.

As a community based organisation EHCBS recognise that engagement with organisations in the village and wider area will have a significant impact on the viability of the enterprise and we will be embedding this as a significant part of our community engagement plan.

#### **Target Group**

- East Harptree Environment Group
- Harptree History Society
- East Harptree ArtsHub and Chew Valley Arts
- St Laurence's Church
- East Harptree Primary School (part of the Lighthouse Education Trust)
- Other stakeholder groups identified in the Asset of Community Value appraisal

#### Outcome / Benefit

- Broadening community involvement and 'buy-in'
- Increasing community understanding and engagement
- Reducing social isolation
- Improving health and wellbeing (mentally and physically)
- Enabling greater community cohesion

#### **Monitoring**

The EHCBS Social Impact champion would monitor the number of active community groups and would report annually to the AGM and liaise with the Pub Tenant.

#### **Timing**

We would look to engage these groups as part of our emerging development plans and we will build on this strengthening relationships by developing this Community Engagement plan.

#### Governance

In order to achieve good levels of community engagement and trust we have established a recognised and robust governance framework.

We have had dozens of volunteers working in sub groups helping the project get this far. These volunteers are supporting the project through a governance structure that comprises a Management Committee overseeing the work of specialist sub groups responsible for Communications, Community Engagement, Environmental and Sustainability, Acquisition and Business Planning.

This governance framework will be built on and should seek to serve our specific stakeholder groups;

- Investor community (members)
- Local residents
- Advocates and supporters
- Volunteers providing practical support for the enterprise
- Pub tenant
- Interested third parties including local service providers and suppliers

We believe that good governance can be assured by a very simple model and with regular and transparent community engagement.

We envisage fairly regular informational updates provided via newsletter, social media, drop-in session in the pub and with a regular update provided via the local community magazine, Chew Valley Gazette and the Mendip Times

There will be a small number of standard events scheduled through the year as follows:

#### Quarterly Performance Update Meeting - Scheduled every quarter (3 months)

A meeting where the EHCBS Management Committee review the overall performance of the pub, mainly focusing on the financial performance, project / initiative updates and a forward view of planned events, project milestones and the ongoing ability to serve the community. All will be in the context of the vision, aims and objectives set out in the business plan.

**Attendees:** EHCBS Management Committee members will join as standard. Other attendees will be invited depending on the agenda topics for discussion.

A newsletter containing key highlights from any update will be made available to the local residents shortly after the meeting.

The meeting will be minuted and published on the EHCBS website.

<u>Annual General Meeting</u> - Scheduled annually and no later than 90 days after financial yearend

**Attendees:** Led by the EHCBS Management Committee, the Pub Tenant will also be present. Local residents and share-holders are invited.

All local residents and share-holders will be welcome and encouraged to attend as a standard update will be provided sharing a performance update on prior periods and a headline plan looking ahead.

The focus of this meeting will include a full review of the financial performance in the form of a detailed appraisal of the annual report and accounts. We will also share a project update for all change initiatives, in addition to a forward view of key milestones. Usage of the pub and the services offered will be provided as will an events calendar for the year ahead.

The AGM will confirm the interest to be paid to shareholders in addition to the timing of any payments to be made and after 3 years it would confirm any withdrawals being funded, and any forthcoming share issues.

A newsletter containing key highlights from any update will be made available to the local
residents shortly after the meeting.
The meeting will be minuted and published on the EHCBS website.

#### ANNEXE

# **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
, 15May2023	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
40 1 2022	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
20-23 July 2023	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
20 301 4 2023	costs.
4 Sept 2023	Community meeting in EH Theatre to present survey feedback and next steps.
14 Sept 2023	EHCBS Limited registered with the FCA.
24 Nov 2023	Community Share Offer launch event in EH Theatre
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- 8 Dec 2023 Drop in session at the EH Pavilion (evening session to accommodate full time employed)
- **14 Dec 2023** Drop in session at the EH Pavilion (tea-time session to accommodate families)
- **22 Dec 2023** Drop in session and pre Christmas gathering at Waldegrave Arms attended by 50+
- 28 Dec 2023 BBC Radio Bristol interview followed up with page on BBC News website
- 11 Jan 2024 Volunteers briefing at the EH Pavilion attended by 20+
- **18 Jan 2024** Feature on BBC Points West about our fundraising activity
- 26 Jan 2024 Community event in the Waldy (Funding update and games night)
- **26 January** Maildrop about share issue followed up with two others in February
- **Bi weeklyish** 12 Mailchimp newsletters keeping community informed sent to 250+ subscribers

## East Harptree civil parish data from 2021 Census



#### **Population**

670

people

56,490,000 people in England

Rounded to the nearest 10 people (nearest 100 for England)

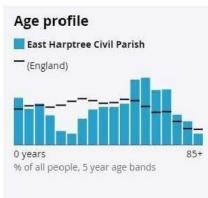
#### Number of households

280

households

23,436,100 households in England

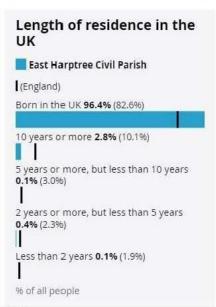
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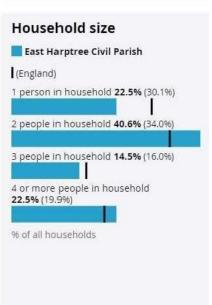




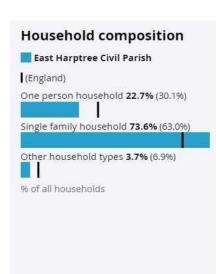


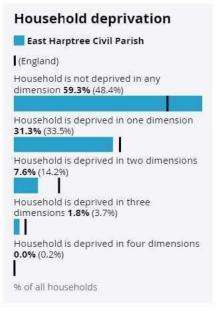






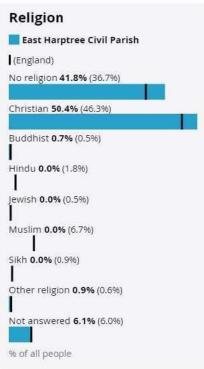
Source: Office for National Statistics - Census 2021.
Information downloaded 05 September 2023
https://www.ons.gov.uk/visualisations/customprofiles/build/

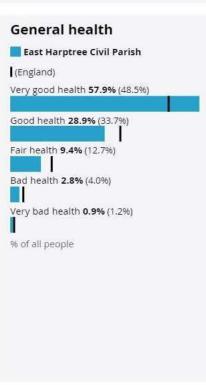












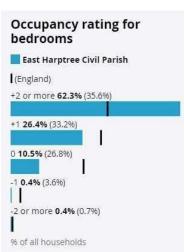






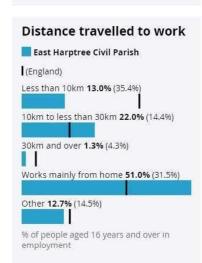
Source: Office for National Statistics - Census 2021 Information downloaded 05 September 2023

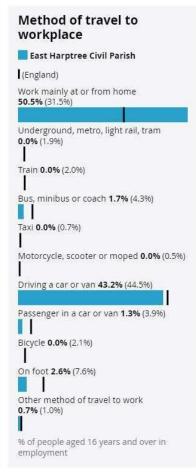














Source: Office for National Statistics - Census 2021 Information downloaded 05 September 2023 https://www.ons.gov.uk/visualisations/customprofiles/build/





