

St Mary's Stockport: Brief for Business and Governance Consultant

Location: Stockport, Greater Manchester

Project Value: £2.2 million (£1.7m construction)

1. Church Overview

St Mary's in the Marketplace, Stockport is a Grade I listed, pre-Reformation church and the oldest building in Stockport, within the Market and Underbanks Conservation Area. The chancel and oratory date from 1320, with roof timbers dendro-dated to 1017. The nave and tower were rebuilt in 1817.

St. Mary's now has an aspiration to develop the church into a heritage centre (whilst remaining an active place of Christian worship) with activities aimed at a wide range of ages and interests; and repairs, maintenance and improvements to the building.

We currently host Stockport Heritage Trust. Our ambition is to significantly increase access to heritage by also providing tower tours, self-guided tours, a heritage escape room and a professional cafe. We would like to develop a programme of activities that increase engagement with the heritage of the church and the local area for people who might not normally get involved. This will include working in partnership with new and existing partners such as Stockarts, Eat Good West and local schools to increase use of the church for gigs, food festivals and educational tours.

2. Project Overview

We are delighted to have secured funding from the National Lottery Heritage Fund to support a development stage project which will set out costs and proposals for us to take forward to delivery stage. At delivery stage this project will deliver:

- Urgent repairs to roof, gutters, stonework, windows, plasterwork and floor tiles.
- New facilities including heating, entranceways and safe tower access.
- New interpretation within and outside the church to tell the story of the building and people connected to it through heritage escape rooms, a tower tour, self-guided QR code tours, and other potential ideas suggested within budget and capacity.
- A programme of activities that will engage a wide range of people with the heritage.
- Commercial and income generating activities and events that will help to secure financial resilience and ongoing maintenance of the building.
- Potentially establishment of a new organisation to run the activities beyond the life of the project.

3. Business and Governance Consultant

A consultant is required with demonstrable (3 projects in the last 5 years) experience of working to National Lottery Heritage Fund (NLHF) Development and Delivery Phase requirements developing business plans and exploring governance and business models, preferably relating them to an active Church of England Parish. The consultant will also ideally have experience of working in historic and active churches and of working with volunteers.

The consultant must be experienced in team working across disciplines including liaison with other consultants to align outcomes, visitor numbers, audiences, and income/ costs for the delivery stage. They must have a clear understanding of NLHF's priorities for Saving Heritage; Protecting the Environment; Inclusion, Access and Participation; and Organisational Sustainability.

Governance: the consultant will report to Rev. Chris Blunt (client) and Peter McIlhagger of PMC Squared (Project Manager) and will attend regular on line project team meetings (monthly). The consultant should plan for 4 of these meetings to be in person on site. These meetings will be alongside the Interpretation Planning and Historic Research consultant, Activity Planner, Evaluation Consultant and Architect/Design Team.

The role will include:

- **Part One (10-Year Business Plan & Financial Strategy):** Undertake market research and financial modelling to deliver a robust 10-year business plan (incorporating a detailed 3-year operating budget) aligning with NLHF *Heritage 2033* priorities. It must address both commercial income generation (café/catering, escape rooms, tower tours, events) and revenue fundraising (hire of premises etc).
- **Part Two (Governance Options Review & Recommendation):** Evaluate governance options for operating the expanded heritage and commercial offer (ranging from in-house PCC operation to establishing a new, independent non-profit entity or trading arm) and recommend the optimal structure.

The budget for this role is up to £20,000 at Development Stage and £1,000 at Delivery Stage for a small training element.

This fee is inclusive of all expenses and disbursements. The consultant must hold Professional Indemnity insurance (minimum £1m) and Public Liability insurance (minimum £2m). The budget excludes VAT.

4. Deliverables for this role

The consultant will:

Market Appraisal & Comparators

- Conduct socio-economic, catchment, and competitive analyses for Stockport and Greater Manchester.
- Benchmark against comparable heritage centres, church conversions, and local commercial offerings.

10-Year Business Plan

- Produce detailed Business Plan including an overview and summary of the whole project; 3-year income/expenditure projections; and, an outline 7-year forecast including sensitivity analyses and cash flow modelling.
- Model commercial revenue streams (café, room hires, escape room ticket pricing) alongside core activity costs and future post-project staff posts.

Governance Review & Recommendations

- Review governance models: 1) In-house PCC management; 2) Subsidiary trading entity; 3) Independent non-profit/CIO; 4) Third-party operating lease/contract; and, other options the consultant may identify..
- Identify legal requirements, risk management, pros/cons, and recommended structures to balance parish operations with commercial heritage activities.

Cross-Consultant Integration

- Work closely with the Design Team and Activity Planner to align space, fit-out, and operational layout.
- Incorporate Activity, Volunteer, Digital, and Maintenance Plan costs and outputs into the final financial strategy.

Reporting & Bid Documents

- Prepare the final **10-Year Business Plan Report** (with Executive Summary) conforming to NLHF guidelines for inclusion in the Delivery Phase bid.
- Draft Delivery Phase briefs/costings for any required legal setup or operational implementation.

5. Essential Skills & Experience

- Demonstrable track record of delivering successful NLHF business plans and governance frameworks (minimum 3 projects in the last 5 years).
- Proven expertise in financial modelling, commercial catering/retail feasibility, and heritage sector market appraisal.
- Deep understanding of non-profit legal structures, church governance, and community asset management.
- Strong collaborative and cross-team communication skills.

6. Timeline

The project team are currently working towards a May 2027 submission of the application to the National Lottery Heritage Fund.

The consultant must also allow for a NLHF mid-term review.

Key milestones (dates to be confirmed unless stated):

- Appointment of consultant team – Sept/ October 2026
- In-Person Site Visit & Baseline Market Review – Oct–Dec 2026
- Draft Governance Options & Financial Models – for mid-term review (date to be confirmed by NLHF)
- Final Draft Business Plan & Costings Agreed – March 2027
- NLHF Delivery Phase submission – May 2027

7. Evaluation Criteria

Applications will be assessed against:

- Understanding of the brief and proposed approach
- Relevant experience and track record (case studies)
- Team skills, capacity and value for money

8. Submission

By Friday 2nd October, interested consultants should submit an application to include: CVs, relevant experience and a methodology for the work. Methodologies should be no more than 6 sides of A4 and CVs no more than 2 sides of A4 per person. Interviews, if required, will be held by video call on Monday 5th or Tuesday 6th October

Applications should be sent to: c.blunt@stockportparish.net and copied to peter@pmcsquared.co.uk and stephen.roche@pmcsquared.co.uk

It is expected that those intending to bid for the work should at least call Rev. Chris Blunt (07503 706906), The Rector of Stockport and Brinnington, to discuss the project prior to submission. Subject to existing commitments, visits to see St. Mary's and discuss face to face are also encouraged.

To assist, if requested, the PCC will supply digital (pdf) copies of:

- The other briefs being sent out that make up the full package of work; and
- Our initial Expression of Interest for the project.