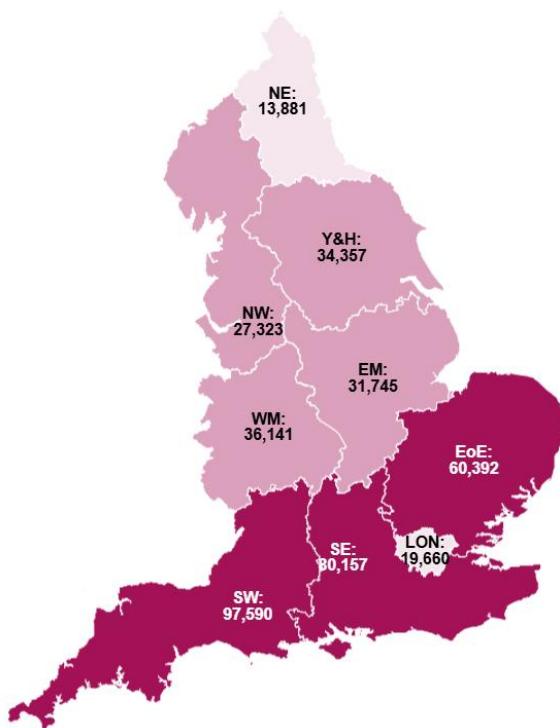




South West Branch

November 2025 - November 2028 Business Plan

The South West region is a large diverse rural and urban region with coastal areas. Mainly rural region with a coastline along both the Bristol Channel and English Channel. Bristol is a harbour city, home to Brunel's Clifton Suspension Bridge and steamship, the ss Great Britain. Neighbouring World Heritage Site Bath features preserved Roman hot-spring baths dating to the 1st century A.D. Stonehenge, the prehistoric stone circle, is found in Wiltshire. Its diverse geography includes cities like Gloucester, Bristol, Plymouth and Truro. Geographically the largest of the nine regions of England with a land area of 9,203 square miles (23,836 km²), but the third-least populous, with an estimated 5,764,881 residents in 2022. The area has a significant number of heritage assets with a total of 97,590 as 3rd July 2025.



- South West Entries: 97,590¹
- Percentage of the total list entries: 24.32%
- Listed buildings: 90,247
- Scheduled monuments: 6,996
- Registered parks and gardens: 305
- Registered battlefields: 10
- Protected wrecks: 28
- World Heritage Sites: 4

The preparation of a business plan is desirable to give a realistic direction to branch activities and the provision of member services. The branch plan should complement and take forward the national Institute's corporate aims and business plan. The business plan was last updated in 2022. The new plan will be a three -year plan take the branch through to the end of 2028.

The Branch Committee

Continuing on from Covid-19 and due to the scale of the geographical area of the southwest branch committee meetings have been held via Ms Teams therefore no costs were incurred for these meetings. Where meetings are held in person, the committee continue to keep costs low due to free meeting rooms using local authority connections. The greatest expenditure is travel for committee members due to the large geographical area. Therefore, the committee will hold three meetings virtually to continue to keep costs reduced and have one face to face meeting a year. There is a continuing need to engage with the central IHBC Council via national meetings etc and again these are completed by a mix of in person and virtual meetings. The branch has a healthy reserve due to previous events being profitable. Due to this the branch have been offering low-cost events covering expenses and also student or low income places to provide subsidised training events.

As part of the Branch Committee communications, our Bulletin Editor, Alex Marsh has been responsible for 12 issues over the past 3 years. The bulletin provides news regarding events and what has been happening around the region.

The SW branch have established LinkedIn and X accounts, where news of events and relevant conservation content is published and forwarded to the new platforms. The SW IHBC LinkedIn page currently has 244 followers and was established in September 2024.

There have been some changes to committee membership since the last Plan period with a new chair, Charlotte Bowles-Lewis and a new vice chair role, James Webb. Maureen Pearce stepped down from the committee in November 2023 after over 10 years as Chair. Maureen was also key in leading work on curtilage and other legal aspects in conservation collaboration with the All-party Parliamentary Group. Maureen was also Devon County Representative. Our thanks go to Maureen for all her hard work and dedication to the committee over the years and will be sadly missed from the committee.

Resignations were also received from Guy Bentham Hill, Wiltshire Representative who has also been on the committee for a number of years. Ours thanks go to Guy for volunteering with the SW IHBC committee.

Gabriella Herrick has taken the role of Private Practice Representative since March 2023 with the retirement of Colin Ellis. Kim Miller, Council Representative since September 2023. Belle Richer Hill has taken on the role of Devon County Representative, and Kate Hudson McAulay in the role of Policy and Consultations officer. The role of Wiltshire Representative is currently being undertaken by Liz Smith Gibbons, who is also our membership secretary. All were formally welcomed to the committee at the branch AGM hosted in Bridgewater on the 22nd November 2023.

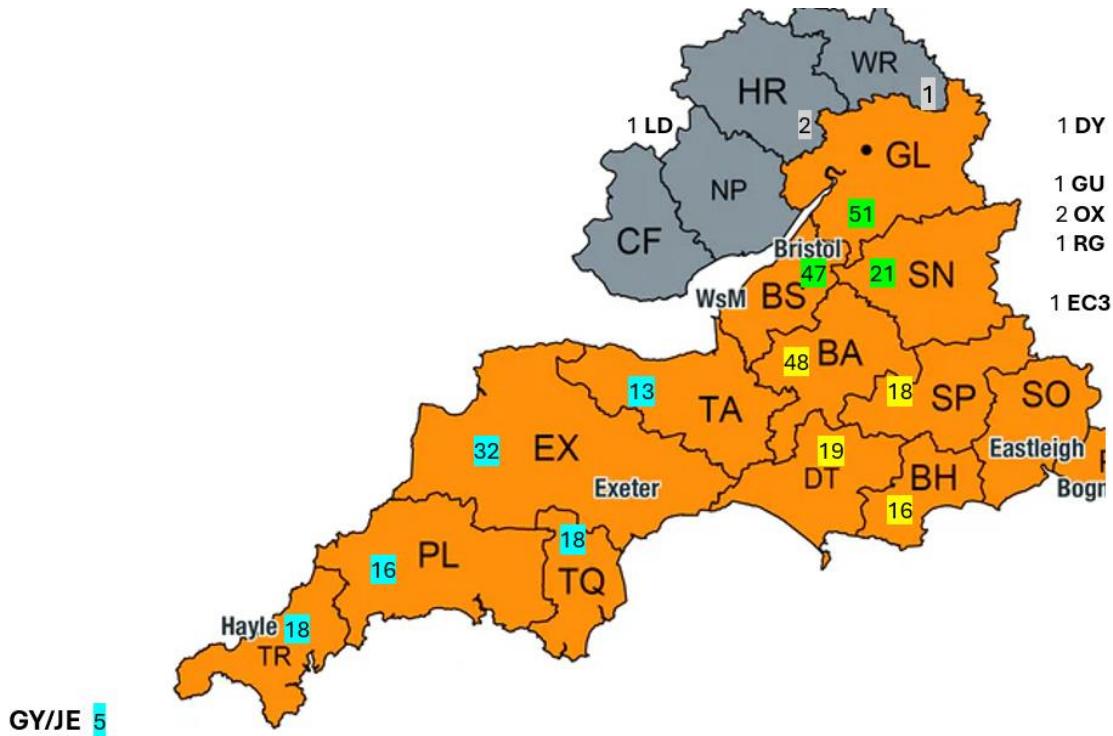
The Branch has traditionally paid small honoraria to support the expenses of the Branch Chair, Secretary, Treasurer and Bulletin Editor. It is recommended that the honoraria is more inclusive and as part of our regular meeting schedule an additional session is held for focussed CPD/site visit for the committee to recognise their contributions to the committee throughout the year. The amount allocated remains the same as the previous honoraria budget therefore there is no proposed increase in expenditure for this change.

Regarding the Bulletin Editor position, Alex Marsh is stepping down following six years of publications. Thanks to Alex for all the hard work which has gone into putting these together for the region. Following Alex's resignation there has been discussion as to whether this post is now required due to the committee establishing an online presence through LinkedIn and X platforms. While it is appreciated that some members are not on social media platforms the branch continue to distribute news and activities via email and as such discussions reviewed the option of a yearly bulletin reflecting news from around each region in the SW.

The SW region has the opportunity to engage with a newly created IHBC Central role identified as a "Branch Consultant". This role is part of the IHBC's National Office, and are responsible for supporting planning, operations and development of IHBC Branches and voluntary networks. Tasks include liaison, advice, support, manage and as appropriate lead tasks where required in relation to Branch planning, communications, learning, promotional and networking. Other assistance can be in the form of communications and social media/promotional activities and add capacity to National Office services, networks and initiatives. The final aspect relates to support for and engagement with IHBC Annual Schools and School-linked event programmes within the branch which will be of particular relevance within the business plan. The role provides 8 hours a month of support and provides the opportunity to have greater connectivity with the IHBC central team.

Membership –

Total membership during 2024 and 2025 has seen a steady, gradual increase to date and details of membership by location are set out below. The region is vast and parts suffer from poor public transport. Most members are based to the east of Taunton. It is also noted that some members choose not to give addresses information, and we also have some members not residing in the SW region ranging from some for example in Oxfordshire/London/Worcestershire/Herefordshire/Yorkshire. Two in Wales and one member whose address is in France.



IHBC SW MEMBERS BY POSTCODE

WEST		SOUTH		NORTH	
TR	18	BA	48	GL	51
PL	16	DT	19	BS	47
EX	32	SP	18	SN	<u>21</u>
TQ	18	BH	16		
TA	13				
GY	3				
JE	2				
	102		103		119

IHBC Central hosts MATE sessions for potential members and also those looking to upgrade their membership, therefore no SW specific events have been held during the business plan period. However local regional events may provide an opportunity for future members to discuss their suitability with committee members should they desire.

Events and Training

In November 2023 the branch held a Retrofitting Traditional and Historic Buildings conference in Bridgewater. This event was hosted by Professor John Edwards. The event was held in partnership with IHBC central “CPD Branch Partnership”. This partnership was a collaboration whereby IHBC Central is financially responsible the speaker and the branch contributing towards to the venue and the catering. The discussions focused on how to retrofit buildings, the IHBC Toolbox on Retrofit, sustainable maintenance and repair that improve performance

and applying standards such as BS7913, BS EN 16883, PAS 2035 and PAS2038. In attendance was 72 people with 24 of those being Non-IHBC members. This session was an in-person event only.

During March 2024 the branch held a “Cob And Earth Day in partnership with the University of Plymouth”. Speakers included Linda Watson, former Associate Professor Building Conservation at University of Plymouth providing a historic overview of the material. A live session was provided by the University on the CobBauge Project and the thermal performance of cob. The afternoon sessions included talks on cob repairs and case studies. This event was a hybrid event but only attracted low number of attendees online, despite the investment in this technology.

The committee had been busy putting together a proposed windows conference during 2024. This was cancelled due to SPAB running a similar event at the RAU called “Through the Looking Glass”. There have been discussions that this would be revisited should members be interested in the topic. Together with a session on retrofitting and renewable technologies. This could be in collaboration with Historic England.

In July 2024 IHBC members were welcomed to No. 9 Fore Street, Chard, leased to the Somerset Building Preservation Trust for the afternoon. 7A-13 Fore Street has medieval origins and may have been a single 13th century burgage plot, later divided into two (typical of later medieval development) or two plots from the outset. The summer visit combined short talks and guided tours of the High Street Heritage Action Zone (completed 2024) and No 9 Fore Street, a Grade I listed medieval building with Jacobean interiors. Speakers include listing adviser Samantha Barnes of Historic England, buildings historians John Thorpe and Jo Cox of Keystone Historic Building Consultants, structural engineer and chair of SBPT Patrick Stow, and Greg Venn, SBPT. The event was a great success and welcomed a number of IHBC members.

In September 2024 a joint RTPI / IHBC conference was held in Gloucester regarding Heritage in Practice. There were 154 attendees as part of the hybrid event and these were mainly with a planning background and there was low take from the IHBC. The cost of the day was expensive compared to SW IHBC events, double the price even with RTPI discounts. The SW committee fed back comments regarding costs but did state we are happy to collaborate on future conferences should this be desired.

In December 2024 a training session was held on Construction Engineering in Swindon. The event was held in partnership with IHBC central “CPD Branch Partnership”. The day looked into the structural repair of historic buildings with Ian Hume – DIC, MInstE, DipIConsAA, IHBC formerly Head of Conservation Engineering at English Heritage. The event was a sell out with 92 delegates attending. This session was an in-person event only. Liz Smith-Gibbons, Senior Conservation Officer, and Karen Phimster HAZ project officer, with Swindon Borough Council provided presentations on recent developments in the area following the session and a tour of the venue, The Pattern Church. The Pattern Church in Swindon is housed in the Grade II listed Great Western Railway Pattern Store, a building from 1897 that once stored engineering templates for locomotives and wagons.

The branch have held two events so far in 2025, these include a joint event with IHBC central,

Placemaking and Design Codes with guest speaker Dave Chetwyn in March held in Redruth Cornwall. The training addressed different aspects of placemaking, design and planning for historic places and the afternoon tours were undertaken followed by discussions. The tours included the Buttermarket, an Architectural Heritage Funded scheme and a tour of the heritage action zone scheme. There was low take up of this event both in person and virtually as this was run as a hybrid event. Only 23 virtual attendees attended, and the event made a loss financially, due to the high costs relating to delivering the online capabilities. The SW committee have been keen to host an event in Cornwall as this area had not been utilised for many years and it is important that the SW region is fully represented.

A second session of the Construction Engineering event was held in Totnes in June and the additional session was held due to members expressing an interest in attending but Swindon being too far north to attend. Therefore the branch decided to host a repeat session. This session was an in-person event only.

A further event the AGM and training afternoon is proposed to be held in Weston-super-Mare in November 2025. The afternoon session will be tours of the heritage action zone work and levelling up funding by the local authority conservation officer and Historic England.

Regarding hybrid events, the general consensus amongst the committee and feedback from events is that most people would prefer to attend in person which also gives opportunities for networking. The price differential is also not substantial giving further reason for people to attend in person. However where a larger conference style event is proposed the use of hybrid technology will be reviewed. Due to the scale of the region, the branch are keen to ensure that everyone can be involved and we will continue to seek to move the training/event opportunities around the SW region. Where they are popular or oversubscribed a second event in a different location will also be considered, this was undertaken with the Construction Engineering day for example.

The Branch aims to hold one conference every year. Future events include the Future of Churches to be held in Salisbury in March/April 2026. The Somerset Building Preservation Trust have also suggested collaborating on a SBPT Symposium 2027 in Chard, at No 9 Fore Street, a building in their ownership.

During the business plan period the Annual Day School is proposed to be hosted in the region in 2027 or 2028. At the time there are no firm proposals but there will be greater need by the committee to be involved in organising the event and potentially additional costs for reviewing venues, meetings and travel expenses and a nominal amount has been included in the business plan.

Following successful collaborations with IHBC central “CPD Branch Partnership” scheme further training opportunities are available regarding fire protection and regulations, enforcement and curtilage. The aim is to provide one a year and provides an opportunity to deliver low cost CPD within the SW region with subsidised places for students and low waged members.

There are also opportunities for continuing collaborations with the SW RTPI, and other organisations such as SPAB, National Trust and Historic England. Due to the scale of the

region it is also recommended smaller training events or local visits are held on a regional basis. This allows for events to be distributed and accessible across the South West and for smaller gatherings such as scaffold tours or behind the scenes visits.

Future proposals for SW branch annual conferences and smaller events will continue to be planned over the period of this business plan taking into consideration:

- information requirements on national issues, such as climate change and resilience
- local information requirements in different areas of the South West
- the importance of a broad geographical distribution of events to ensure participation across the region.

The new business plan seeks to match resources to intentions and the table following sets out the expenditure for the business plan.

Estimated expenditure 2025-2028 plan

Reserves as at 1st October 2025				£11,909.31
Objectives	Targets	Proposed Actions	Lead Member	Budget per year
Raise and maintain standards of conservation practice in the South West Region.	<p>Maintain contact with membership through</p> <ul style="list-style-type: none"> • quarterly branch meetings around the region; • maintained list of e-mail addresses; • Distribution of information via social media channels • Assist member maintain their CPD requirement with affordable courses. • Ensure that IHBC contributes towards the development of professional accreditation for those working in historic building conservation 	<ul style="list-style-type: none"> • Quarterly meetings hosted online with aim to hold two meeting per year in different, varied venues within region, (includes travel, room booking, site visit and refreshments/lunch) • Electronic distribution of minutes of meetings and correspondence • Manage existing budget to cover expenses of committee & provide for incidental expenses (petty cash) • At least 80% of the meeting/training day should qualify as CPD. • CPD Certificates will be issued to delegates. Courses will be improved with delegate feedback from questionnaires. 	All Secretary/Branch Reps Treasurer All Secretary/Treasurer	£800 None None None None None

<p>Contribute to the national debate on conservation legislation and practice guidelines.</p>	<p>Contribute to IHBC consultation responses from Council and independently when appropriate</p> <p>Contributions to Context Magazine</p>	<ul style="list-style-type: none"> Coordinate and channel consultation responses Discuss collaborative contributions to Context, one article per year. 	<p>Secretary/Branch Reps All Members</p>	<p>None None</p>
<p>Educate, update & inform conservation professionals in the South West Branch and offer CPD opportunities for members</p>	<p>Conferences, educational visits & seminars related to conservation theory & practice.</p> <p>Continuing Professional Development</p> <p>Build partnerships with relevant organisations such as Historic England, National Trust, SPAB, RTPI, for training events</p>	<ul style="list-style-type: none"> Branch meetings One Day conference Per Year (room+catering+speaker/cttee expenses) AGM Weston Super Mare and future AGMs IHBC central “CPD Branch Partnership” scheme training days Online events and training sessions Events and visits across the branches Annual Day School 2027/28 (one off event) 	<p>Chair & All Members</p>	<p>As above. £3000 £800 £1500 £1000 £1000 £1000</p>
<p>Attract and retain new members to the IHBC through branch activity.</p>	<p>Use IHBC corporate information and membership in professional communications.</p>	<ul style="list-style-type: none"> Encourage fellow professionals to become involved. 	<p>All Branch Members, Membership Secretary and Branch Consultant</p>	<p>None</p>

<p>Offer a forum for airing common issues in the conservation field in a supportive environment to develop new conservation ideas and lobby for change. Maintain and foster new relationships locally and centrally.</p>	<p>Ensure an inclusive agenda at Branch meetings.</p> <p>Collect and coordinate feedback from branch members to be forwarded up to Council.</p> <p>Maintain relationship with Central Committee and attend branch connection days</p> <p>Build partnerships with relevant agencies</p> <p>Offer supportive environment for members reflecting welfare and mental health concerns that arise in the heritage field</p>	<ul style="list-style-type: none"> Request that members make contributions on specific issues at specific branch meetings. Ensure wide subject range of contemporary and recurring issues including urban and rural balance Minute comments from members at all of branch meetings to be distributed to branch and feed back to Council Representative to attend Council meetings Assist in provide a range of networking opportunities and regional events as above 	<p>Chair Secretary/ Chair Secretary & Branch Reps & Council Rep Council Rep All</p>	<p>None None None £250 As Above</p>
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Est. total expenditure	£8350
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Est. income	
Conference delegate fees Future of Churches - £3000	£3500
Other Training/CPD events - £4300	£4800
Est. Total income	£8300

Excess of income over expenditure	
Estimated reserves at 1 st October 2028	£11,589.31