



BLENHEIM PALACE WORLD HERITAGE SITE

SECURING THE FUTURE OF ONE OF THE NATIONS
GREATEST HERITAGE ASSETS

- JULY 2015

WOODSTOCK EAST



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Introduction and Foreword

Blenheim Palace (BP) is proud of its heritage, the heritage of Woodstock and its long-standing association with the town.

The Woodstock East development will continue this tradition and will be a place that Blenheim Palace can be proud of. It is designed to endure the test of time, and to create the next chapter in the Blenheim and Woodstock relationship; complementing and strengthening the last 900 years of history.

This document is intended to outline how this will be achieved. It should be read in conjunction with other documents submitted alongside the Planning Submission, including, in particular, the Woodstock East Design Response Document and the Woodstock East Sustainability Statement.

This document addresses three key issues in enabling the secure future of one of the nations greatest heritage assets. These issues are each explored in detail and comprise the following;

Section 1 – Funding the World Heritage Site

An opportunity to fund the World Heritage Site for the foreseeable future and meet the objectives of the World Heritage Site Management Plan.

Section 2 – Development Procurement Plan

To secure design standards of the highest quality to compliment and enhance both the World Heritage Site and the historic town of Woodstock.

Section3 – Stewardship Plan

To ensure the development is managed post completion to a standard consistent with both the high standards of the World Heritage Site and the town centre. This will be achieved with continued direct management and continued investment and ownership by the Blenheim Palace Estate.

The Blenheim Palace Estate will retain direct input, control and management of all of the key aspects of the development process and will, thereafter, retain a direct interest in its on-going management, appearance and success.

SECTION 1

Funding the World Heritage Site and meeting the needs of the World Heritage Site Management Plan





WOODSTOCK EAST

STATEMENT ON BLENHEIM PALACE WORLD HERITAGE SITE

Consent at Woodstock East will ensure that the Blenheim Palace World Heritage Site becomes fully funded, protecting one of the Nation's most valued heritage assets for the foreseeable future.



The Woodstock East (WE) proposal site is close to the Blenheim Palace World Heritage Site (WHS), one of the most significant heritage assets in the country. It is the only WHS which has not received any Heritage Lottery Funding and it cannot receive any meaningful levels of Heritage Lottery Funding or any other public funding due to its ownership status.

Within the WHS, the Palace is open to the public for approximately 300 days a year and the Grade 1 Listed Parkland for 364 days a year. The WHS is funded by the net operating surplus from running the WHS as a visitor business and other wider Estate businesses. It also receives additional but limited funding from Maintenance Funds and the Blenheim Foundation, a charity which has as its express purpose, the long term protection of the

World Heritage Site. Over the last six years this surplus before restoration and maintenance has averaged £745k per annum of which approximately £700k is spent on maintenance (i.e. on average 95% of the surplus and referred to in this document as “the maintenance spend” (as distinct from the “restoration spend”). Additional support is also provided from Maintenance Funds and the Blenheim Foundation to fund restoration of another £700k (the restoration spend) - to give a total average expenditure of £1.4m.

The work funded from the Visitors’ business surplus consists overwhelmingly of general maintenance and redecoration, rather than execution of significant restoration elements as identified in the World Heritage Site Management Plan (WHSMP). It is believed that the Visitors’ business will always have to fund a maintenance spend in the order of £700k per annum as a contribution to maintenance and to maintain the general decorative order of the Palace, regardless of the number of restoration projects undertaken.

The Maintenance Funds and the Blenheim Foundation in general are presently the only source of funding for the significant restoration projects identified by the WHSMP. These in recent years have included the restoration of the South Front Steps, the Ice House, the restoration of the north portico roof, Reservoirs Act compliance works to the Blenheim and Bladon Dams, re-wiring parts of the Palace, refurbishing the Clock Tower and Great Court columns as well as works to the roof and Palace windows.

The management of the WHS is guided by a WHSMP, a publicly available, comprehensive document prepared in accordance with published advice from ICOMOS and Historic England. It considers the input of all stakeholders (led by Historic England and Natural England) to inform a joined up approach to the long-term management and sustainability of the WHS.



Reservoir Act compliance works to Blenheim Dam – cost £1.5m

The WHSMP contains a schedule of “wants of repair” and works required to the physical fabric of the WHS over the next 20 years. It was compiled by ‘Nick Cox Architects’ who specialise in the conservation of heritage assets, including listed buildings, churches, and cathedrals. They have prestigious clients **including** the National Trust and Historic England. The schedule identifies “wants of repair” and priorities, excluding decorative and planned recurring maintenance. The schedule has been costed by a Quantity Surveyor from Ridge LLP (who specialise in heritage assets) to assess the total cost of those identified items.

The costing figures can be made available on request; we would however ask that they remain confidential as they do contain some commercially sensitive details. As is normal in such cases, there is no objection to sharing such information with Historic England and the relevant Local Authority officers.

Blenheim Park Ice House restoration - £120k – part of the heritage restoration program



Before



After



Before



After

In summary the wants of repair and restoration, excluding ongoing maintenance spend have been identified over the next 20 years as totalling approximately £40m. No allowance for inflation over this period has been made.

This Planning Application provides one of the most exceptional opportunities that has ever arisen to utilise the proceeds from a development to secure the long term future of a very significant heritage asset.

If granted consent, the Woodstock East development will enable the Blenheim Palace World Heritage Site to become fully funded for the foreseeable future. 100% of the net relevant proceeds from the sale of the consented site will be donated by the landowner to the Blenheim Heritage Foundation (a charity set up for the express purpose of maintaining and restoring the fabric of the WHS), allowing the establishment of an endowment to ensure the long-term sustainability of the World Heritage Site.

As stated previously, over the last 6 years we have expended £700k annually of restoration spend on the WHS, significantly informed by work identified in the WHSMP. The WHSMP identifies that in order to achieve its restoration targets, work should be carried out at the rate of £2m a year, although we are currently able to expend no more than £700k showing a current annual shortfall of £1.3m - which will increase as the costs of projects increase in line with inflation.

It is proposed, from the proceeds of sale of the consented site, to fully fund the shortfall AND set up an endowment through the Blenheim Heritage Foundation to ensure the long term sustainability of the WHS. For clarity, the commitment to donating 100% of the net relevant proceeds from the sale of the consented site will be *IN ADDITION TO* the commitments to provide affordable housing (40% of the housing proposed to be affordable), a new primary school, to relocate Woodstock Town Football Club and to the other major contributions related to the Woodstock East planning application.

In summary:

The Visitor and wider Estate businesses will continue to fund the maintenance spend on the WHS with the annual operating surplus of approximately £700k per annum.

In addition:

Identified restoration costs in WHSMP	£40m
WHSMP target for annual restoration expenditure	£2m
Current annual restoration spend	£0.7m
Shortfall	£1.3m

This shortfall will be met through:

Establishment of endowment	£43.3m
Assumed investment return @ 3%	£1.3m

This proposal presents a once in a life time opportunity to protect one of the Nation's most significant heritage assets and without this opportunity being realised, no such guarantees can be given.

The significance of such support has recently been reiterated by HMRC agreeing a new Heritage Undertaking¹ in respect of the WHS Heritage and other assets.

Such an opportunity cannot be ignored for both financial and moral reasons. We believe that we have demonstrated clearly that this proposed development will cause no harm to the WHS or the Woodstock Conservation Area.

In fact, we consider that the landscape proposals and sensitive design will positively enhance both the approach to the WHS and Woodstock Conservation Area. However, not all agree with this statement and some parties have chosen to try to use a heritage argument to criticise the scheme.

The proposed full funding of the WHS that this proposal will deliver is so significant a benefit, that, in our view, it will dramatically outweigh any contrary arguments of harm (which in any event we strongly refute), which may be advanced by others.

¹¹ The conditional exemption is a regime under which the payment of inheritance tax on national heritage items is deferred on the condition that such items are maintained by the owner and are displayed to the public.

The approach we set out fully reflects the National Planning Policy Framework's requirement for the nation's heritage assets to be conserved in a manner appropriate to their significance.

The WHS is one of the best examples in the country of the wider social, cultural, economic and environmental benefits that conservation of the historic environment can bring. The innovative approach to the funding proposed will make a positive contribution to, and better reveal the significance of the WHS, in line with national policy and to the long term, sustainable benefit of all.

Due to the overwhelming and unique opportunity this application presents to fully fund, at no public expense, the Blenheim Palace World Heritage Site, we urge Officers and Councillors to fully support this application.

Section 2

Development Procurement Plan

To secure design standards of the highest quality to complement and enhance both the historic town of Woodstock and the World Heritage Site





EAST WOODSTOCK

STATEMENT ON POST PLANNING PROCUREMENT

This section summarises how the Blenheim Palace Estate (BPE), the landowner will deliver the development following the grant of a Planning Consent and should be read in conjunction with the submitted Woodstock East Sustainability Statement and the Woodstock East Design Response Document.



BPE and Woodstock have had a strong intimate link and have existed side by side for over 900 years.

The development of Woodstock East will take between 10 and 15 years to complete and when compared to other developers and landowners BPE has a significant vested interest in not only ensuring that the completed development is exemplary in terms of design,

economic impact and social integration, but also that the process of development has a truly positive impact on both the residents of Woodstock and the Blenheim Palace World Heritage Site.

The BPE will have a far greater input into the procurement of the development than other landowners would, including:

- The production of a Design Code which will be agreed with appropriate stakeholders including the Local Planning Authorities; this Design Code will become a conditional part of any sale of land to third parties to avoid later dilution.
- BPE will take on responsibility for procurement of infrastructure.
- To facilitate and fund the infrastructure delivery, serviced plots will be sold to third parties subject to strict controls on design, materials and delivery methods.
- BPE through its in-house construction capability will undertake significant development directly; evidence of the quality of their construction output over the last 10 years is very evident locally and is indicative of the high quality approach of the BPE brand.
- Phasing has been covered elsewhere in the submission, but a general principle of servicing the site through the main site access off the A4095 will be pursued to minimise impact on the A44 and the town.

Large Estates have in the past, traditionally been associated with the provision of affordable housing in its various guises, whether it be through Alms Houses, Tied accommodation or Grace and Favour for long serving retainers. To further illustrate this long term commitment to the scheme BPE is considering the scope to become a Registered Social Landlord, whereby its experience and skills in the delivery and ongoing management of housing can be extended to cover the significant (40% of all housing) proportion of affordable housing at Woodstock East. Early discussions have been held with both The Housing Finance Corporation, The Housing Corporation and officers at West Oxfordshire District Council to explore this opportunity and at the time of writing further discussions are planned with officers at Cherwell District Council.

The intent is present and early signs optimistic, however, it is not at this stage possible to offer greater certainty on the viability of BPE becoming an RSL as it is intimately linked to funding sources which as a rule have strict project delivery dates which we are unable to take advantage of without the security of a consented site.

Phasing Strategy



The procurement of materials will prioritise local procurement where practical and will be written into the Design Code. This will help to ensure that new buildings reflect local character, as well as avoid lengthy transport movements. In addition, a successful local procurement strategy can help support local businesses and jobs.

BPE intends to take on a role of direct involvement in influencing the delivery of the scheme; it will aim to deliver many areas itself through its own contracting capability and it will act as far as possible to ensure that the highest standards are adhered to and that the procurement process is aligned with the BPE high quality brand image associated with both Blenheim Palace itself and the many other successful developments it has carried out locally.



Bens Close, Woodstock



Ramillies Close, Woodstock



Limbeck Farm Cottages, Stonesfield

Section 3

Stewardship Plan

To ensure the development is managed post completion to a standard consistent with both the high standards of the existing historic town centre and World Heritage Site. The Blenheim Palace Estate will achieve this through continued direct management, investment and ownership.





WOODSTOCK EAST

STEWARDSHIP MANAGEMENT PLAN

Blenheim Palace and the wider Blenheim Palace Estate (BPE) is unique!

The Stewardship Plan addresses the management of the development post procurement, including the built areas to be retained by the Estate, the common areas and the community facilities

It is a fundamental principle of the BPE that its developments, wherever they are, bring significant environmental, economic and social benefits. In this way, the BPE can ensure that all of its developments bring added value.

It is essential to the BPE that any development within the Blenheim Palace World Heritage Site, its setting and immediate surrounding areas do not detract from, and wherever possible, enhance this heritage asset of worldwide significance.

For these reasons, the BPE has always adopted a multi-generational approach to its developments. Taking the long view and implementing measures to continuously steward development are one of the special qualities of the BPE. The Woodstock East development will benefit significantly from this approach.

Frequently, when major sites are granted consent, packages are sold off to the highest bidders, who then deliver their products as profitably as they can. Often, this accountancy-driven approach places design and the long term sustainability of the development well behind the profit motive. The impact of this is evident in many of the local towns in both West Oxfordshire and Cherwell.

The BPE adopts a fundamentally different approach and is motivated by entirely different criteria. The sustainability of one of the country's most important heritage assets and ongoing, sensitive investment into an inextricable, almost Millennium-long, link with the local area are factors that underpin the approach of the landowner of Woodstock East.



The Blenheim Palace Estate (BPE) has been inextricably linked with the town of Woodstock for over 900 years, dating from the creation of a Royal Deer Park, and hunting lodge in 1109, to the more recently in historic terms, construction of the current Palace as the home of the Dukes of Marlborough, following the battle of Blenheim in 1704. Relationships have changed as times have changed, but the linkage has, and always will, remain very strong. The success of Blenheim impacts directly on that of Woodstock, and vice-versa.



Consequently, the BPE must ensure that the Woodstock East development is a success, in planning, design, environmental, social and economic terms. Through sustained, carefully managed stewardship, Woodstock East will over the long term, successfully deliver and integrate with the local community.

Values				
Inspiring  <i>We delight our visitors</i>	Authentic  <i>We're a family home, we're not National Trust and we're the real thing</i>	Respectful  <i>We show respect to our palace, our visitors and our people. We earn their respect in return</i>	Committed  <i>We are personally committed to deliver the best for our Palace, our visitors and our people</i>	Positive  <i>We adopt a positive can-do attitude every hour of every day</i>

The above sets out the essential qualities of the established Blenheim Palace “brand.” The describing words are those recognised by hundreds of thousands of visitors to the World Heritage Site and its setting every year.

The Woodstock East development will be something that the BPE can be proud of. It is designed to endure the test of time, just as the Blenheim Palace Estate and Woodstock have done over the last 900 years.

The BPE will retain direct input, control and management of all of the key aspects of the development process and will, thereafter, retain a direct interest in its ongoing management, appearance and success.



Built Areas

Commercial areas – these are divided into 2 main areas; the commercial employment areas to the southern end of the site, and the commercial/retail centre at the northern end of the site.

- **Southern commercial area** – the Masterplan provides 13,800sqm of commercial employment land. The BPE intends to retain the freehold interest of this area, develop it out with its own design and construction team and let it on commercial terms. Thereafter, it will be managed directly as part of the BPE property portfolio, for the long term benefit of the Estate.
- **Northern commercial area** – The Masterplan provides approximately 1,000sqm of retail space and depending upon demand, other non-retail commercial uses including a crèche and health care facilities. These uses will be selected to support rather than compete with the existing facilities of the town. The strategy for their management, including tenant selection, will reflect this approach; ensuring that Woodstock East compliments and supports the existing town.

The BPE intends to retain the freehold interest of this area, to develop it out with its own design and construction team and to let it out on commercial terms. It will be managed directly for the long term benefit of the Estate.



Common Area

It is increasingly common for Local Authorities to pass the ongoing responsibility for management of common areas to developers. In the case of Woodstock East, we have been informed that this will be the position of WODC and that although Cherwell DC would be happy to take on responsibility for the part within their District, they would be equally happy for it to be retained and administered by the developer.

It is the intention of the BPE to set up a management company, owned and run by the BPE, for the function of delivering the management services required to ensure that the standards of the common areas are maintained in a high quality manner appropriate to their setting, in proximity to both the historic centre of Woodstock and the Blenheim Palace World Heritage Site.

As set out above, it is essential that the BPE delivers and manages the highest quality standards, maintaining all of these areas in a pristine condition at all times.

This strategy for places ensures that all sides of the masterplan connect with green vistas leading to key masterplan destinations



A Local Centre
- Providing a small scale public realm for the surrounding residential area



B School Campus



C Woodstock Park
- A 7.5ha park which connects the masterplan providing a community focus



D Connection of green spaces
- The Avenue
- Community Sports green (Victory Park)
- Residential Courtyard (Vanbrugh Square)



Community Facilities

The development will deliver many additional and enhanced community facilities including:

- New Football Club facilities for Woodstock Town Football Club;
- An all-weather MUGA pitch;
- Open space for sporting facilities;
- Recreational space;
- Allotments;
- A new primary school.

It is proposed that all the land for the new football facilities will be leased to the operators, allowing the BPE to maintain overall control, particularly in respect of management, appearance and standards – this will follow the same Design Code approach.

It is proposed that the new facilities will be designed to accommodate growth and enable the club to diversify and expand what it can offer. The club buildings will not be for the exclusive use of the club, as it is proposed that adult education facilities currently squeezed into the Marlborough School will be relocated here.



It is proposed that a management agreement be drawn up between the Marlborough School and the Football Club, most likely administered by the school, to allow joint use, with each

operator having preferential hours of use. Outside these hours, the facilities will be extended to, and available for, wider community use by the residents of Woodstock and surrounding villages.

The MUGA pitch will be included within this arrangement. The general principles of the shared management facility have been discussed with the relevant stakeholder and the principle is strongly supported. This sort of arrangement has been very successful in many other locations.

The allotments and other recreational spaces will either be managed directly by BPE or, where appropriate, be leased to local groups. This is something that already occurs, successfully, in many locations across the wider BPE.

In respect of the primary school, it is anticipated that the land will be leased on a long lease to the education provider, whether that is the County Council or local Academy or other provider.

If, as anticipated, BPE becomes a Registered Social Landlord, its significant experience and skills will extend to the delivery and management of the (40%) affordable housing to be provided at Woodstock East. This will provide for BPE's stewardship approach to include a large proportion of the site's housing on an ongoing basis.

Conclusion



The BPE will ensure that this development succeeds.

As with all of the BPE's developments, it is essential that Woodstock East comes to be regarded by both residents and visitors as an exemplar place, demonstrating the intimate linkage that has existed between Blenheim Palace and Woodstock over the last 900 years.

Not only is this scheme immediately deliverable, sustainable in its widest sense and outside the Oxford City Green Belt, but it also provides an opportunity for the traditional linkage between the local community and the landed estate to be reinforced. It provides for the high standards and brand profile that Blenheim Palace is synonymous with, expressing itself through the level of input, control and ongoing management of the development into the future.

Blenheim Palace is proud of its heritage, the heritage of Woodstock and its long-standing association with the town.

The Woodstock East development will continue this tradition and will be a place that Blenheim Palace can be proud of. It is designed to endure the test of time, and to create the next chapter in the Blenheim and Woodstock relationship; complementing and strengthening the last 900 years of history.

The proposed development is deliverable and it will become a high quality gateway into the town, something that everyone both locally, regionally and nationally can be proud of for long term future of this place.

The WHS is one of the best examples in the country of the wider social, cultural, economic and environmental benefits that conservation of the historic environment can bring. The innovative approach to the funding proposed will make a positive contribution to, and better reveal the significance of the WHS, in line with national policy and to the long term, sustainable benefit of all.

Due to the overwhelming and unique opportunity this application presents to fully fund, at no public expense, the Blenheim Palace World Heritage Site, we urge officers and councillors to fully support this application.

