

City of Edinburgh Council

Application for an Asset Transfer

Stage 2 – Sustainable Business Case

Introduction

Following assessment of a Stage 1 Expression of Interest by a Panel, your organisation may be invited to progress your proposals, setting out in further detail the wider community benefits, provision of services and financial aspects of your proposals that could enable the transfer of the land and/or building currently owned by the City of Edinburgh Council.

This form provides for the following:

- Section 1 - Guidance on the Council's Asset Transfer Policy and on submitting a request at Stage 2;
- Section 2 - Sources of free and specialist (with a fee) advice and support in progressing a detailed capability and financial plan;
- Section 3 – Completing the Stage 2 Form. This addresses the wider community benefits, proposed provision of services, the costs involved and how you intend to maintain ownership and revenue provision over many years. (The form can be completed and submitted electronically).

Section 1 - Guidance

You should read the [Scottish Government Guidance for Community Transfer Bodies](#) to ensure that you have included all the information required for this submission to comply as an Asset Transfer request. Specific timescales for submissions apply and you should make yourself familiar with these.

Applicants should also read the Council's Asset Transfer Policy prior to completing an initial request (Stage 1 – Expression of Interest Form) or the more detailed Stage 2 – Sustainable Business Case.

Question - Why do we need to set out our detailed proposals at Stage 2 for using the asset and how the project is to be funded?

Answer: Your application will be considered by the Council's Finance and Resources Committee. The Committee needs to know that the proposals contain a number of key factors, for example;

- Is there evidence of strong community support for your proposals for use of the asset and any related impacts taken into account?
- Is there a considered analysis of the market for the use of the asset as this lets Committee know that other services/provision has been examined within the local area and across the City?
- Have the financial aspects of acquiring and using the asset been thoroughly examined to ensure that any risk is minimised and that the prospect of returning to the Council for assistance or for requests for funding is minimal?

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Question – What is a Sustainable Business Case, what should be included and how should this be presented?

Answer: A detailed Business Case is required to cover a period of years, setting out how you intend to use and finance the asset.

The sustainability aspects relate to; (i) how you intend to continue long-term ownership, (ii) arrangements for strong governance and intended operations including financial arrangements for long-term growth, (iii) improving community benefit and (iv) minimising any harmful environmental impacts.

In relation to how your plans should be presented, this is a matter for you to decide, so long as your Stage 2 Business Case provides the level of detail required.

Question - What can be included within a sustainable business plan?

Answer: The following is provided for additional guidance only and is not comprehensive because plans for the use of an asset will be different in each case. You may wish to consider some of these elements within your plan which will help make use of the asset a success.

Part A

Market and operational environment:

- strategic fit between the business objectives of the community body and the proposed use of the asset;
- impact of taking on the asset based upon current and future capacity and capability;
- the skills of the community body that will enable sound management and productive use of the asset;
- the strength of partnership to take on and make the asset a success, in particular clear identification of the community benefits arising from the transfer of the asset;
- current capacity and what partnership arrangements exist to enhance the prospects for medium and long-term success of the use of the asset;
- is there a clear business growth plan and marketing plan in place in order to maximise the use and income generation prospects;
- why the asset is needed and its intended use - aligned to local policy, strategy and community needs;
- define the economic, social and environmental benefits of the use of the asset and the advantages in this regard of the proposal;
- demonstrate engagement with the wider community in order to ascertain usage and success of the proposal;
- management of risk, accounting for unforeseen circumstances and avoiding putting at risk the core organisation/partners;
- information on the strength of commitments by interested parties;
- the most advantageous delivery model and governance structure to manage the asset during/post transfer.

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Part B

Financial management - Budget and income, provides evidence of:

- revenue costs are known and plans take these into account;
- repairs and other improvements to the asset are taken into account to reflect the business proposition;
- projected income/expenditure plan for at least five years to identify a range of sustainable income streams;
- financial risks to both the asset and applicant organisation;
- projected utilisation and cash flow forecasts;
- market analysis and mitigation of financial risk for partners and the wider community;
- available funds to invest in the asset.

Section 2 – Sources of Advice and Support

In examining the use of an asset for the benefit for the community it may be helpful for you to request specialist help and support. The following organisations* are independent of the Council and can provide additional support if requested. Dependent upon the nature of the request, some of these will be free and some may apply a fee.

- [Development Trust Association Scotland](#)
- [Edinburgh Business Gateway](#)
- [Edinburgh Third Sector Interface](#)
- [Community Shares Scotland](#)

Also,

- Council and the Community Learning and Development Service

*Other support agencies are available and this should not be interpreted as an endorsement from the Council.

Sources of further information and reference* are also available, some of which are as follows:

- [SME Business Planning Toolkit](#)
- [Starting a Social Enterprise – Business Planning](#)
- [Business planning – 8 critical success factors](#)

*Other sources of information and advice are available and should not be interpreted as an endorsement from the Council.

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Section 3 – Completing the Stage 2 Sustainable Business Case Form

Assessment Scoring

Question: How will Stage 2 submissions be assessed?

Answer: A scoring matrix will be applied in the assessment of proposals and these will consider the proposed use and financial provisions made for the asset.

The following scoring will apply:

<u>Score</u>	<u>Criteria</u>
0 = Poor	Little or no response in regards to the submission with ill defined unrealistic ambitions
1 = Weak	The submission contains only minor detail and is not based on robust information
2 = Moderate	The submission provides a level of detail which enables understanding with acceptable projected benefits
3 = Strong	The submission provides sufficient evidence that the issue has been taken into account with sound, sustainable Best Value characteristics
4 = Very Strong	The applicant has included all the issues in the submission and has provided additional information which enables detailed understanding with strong and sustainable Best Value characteristics with robust related project benefits

Assessing Equality and Rights and Sustainability Impacts

The Council under the Equality Act 2010 and the Climate Change (Scotland) Act 2009 with the related Public Sector Duties is required to assess whether there are any detrimental impacts potentially arising within asset transfer proposals and to identify how these can or should be mitigated. Council officers will assist you in the development of these assessments which are used by the Council in the decision making process. Questions are included within the application form (see part C).

Completing the Stage 2 Form

The key questions in the form below are designed to tell Committee about the governance of your organisation, your detailed plans for the asset, support from the local community and other interested parties, financial plans, current relationship with the Council and other information. Information contained within the application will however be shared with those involved within the decision-making process and data protection and commercial confidentiality arrangements will apply on such occasions.

The Stage 2 Form contains sections for (i) information on the key elements of the Business Case, (ii) information on how the asset relates to Council policy outcomes and/or key public strategies in Edinburgh and (iii) any additional information. Please ensure that if you have a separate Business Case that you attach it to your Stage 2 Form as this will avoid the need for any delays in the assessment of your submission.

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Please note that:

- Council officers may require a number of follow-up meetings to discuss your proposals. This is with the aim of better understanding your intentions.
- The minimum timelines, whilst set out in the policy, may be extended for particularly complex submissions, for the briefing of community members and other interested parties including local elected members, or where there is a delay in submitting additional information beyond the control of those involved.

Finalising your submission and accompanying information

Please ensure that you answer all of the questions asked throughout the form. Failure to fully respond may delay your request being considered by the Council.

Please also ensure that:

- a) You attach the required documents as identified at the end of the form,
- b) Three people from your organisation sign off the application. This is to ensure that the Board of Directors/Management Group are aware of and support the submission.

Please return the form to:

Property and Facilities Management
G4 Waverley Court
4 East Market Street
Edinburgh
EH8 8BG

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**APPLICATION FOR THE TRANSFER OF AN ASSET
CURRENTLY OWNED BY THE CITY OF EDINBURGH COUNCIL**

Request to the Council

	<table border="1"> <tr> <td>Is this application being made under Part 5 of the Community Empowerment (Scotland) Act 2015?</td> <td></td> <td>YES</td> </tr> </table>	Is this application being made under Part 5 of the Community Empowerment (Scotland) Act 2015?		YES	
Is this application being made under Part 5 of the Community Empowerment (Scotland) Act 2015?		YES			
1.	<p>Are you requesting the transfer of a building that is owned or leased by the City of Edinburgh Council YES</p> <p>Are you requesting the transfer of a piece of land that is owned or leased by the City of Edinburgh Council YES</p>				
2	<p>Please identify the building and/or piece of land that is the subject of your request: NAME: Victoria Primary School ADDRESS: Newhaven Main Street POSTCODE: EH6 4HY MAP REFERENCE: (please attach a map indicating the location of the building/land – this is in order that all parties are clear on the nature of the request) See Appendix 1</p>				
2a	<p>Please state whether this is an application to purchase or to lease the property or if the request is for other rights to use the property: The application is to purchase</p>				
2b	<p>VALUE Have you sought an independent financial assessment of the value for the building/land? If so please identify the source and the estimated value (Note: because your request concerns a public asset, references to the source(s) and value(s) may be referenced in reports to council committee(s) in reference to your submission:</p>				
	<table border="1"> <thead> <tr> <th>Source:</th> <th>Estimated value (£)</th> </tr> </thead> <tbody> <tr> <td>A joint valuation of the complete site was commissioned by Heart of Newhaven and CEC. The independent valuation was carried out by Cushman & Wakefield. A copy of the valuation report dated 24 January 2020 is attached as Appendix 2</td> <td>£785,000</td> </tr> </tbody> </table>	Source:	Estimated value (£)	A joint valuation of the complete site was commissioned by Heart of Newhaven and CEC. The independent valuation was carried out by Cushman & Wakefield. A copy of the valuation report dated 24 January 2020 is attached as Appendix 2	£785,000
Source:	Estimated value (£)				
A joint valuation of the complete site was commissioned by Heart of Newhaven and CEC. The independent valuation was carried out by Cushman & Wakefield. A copy of the valuation report dated 24 January 2020 is attached as Appendix 2	£785,000				
3	<p>Please detail below the nature of the request to the Council (please complete one section only):</p>				

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3a	Total transfer by sale or lease of the building/land identified in Section 2 above: YES
3b	Gradual transfer by sale or lease of the building/land identified in Section 2 above: NO
3c	A transfer of just a part of a larger building or part of a larger area of land: NO
3d	If the request is for other property rights (ie not a sale or a lease) to make use of a property please specify the nature and extent of the rights sought:
4	Please indicate below the purchase price, rental or other payment being offered for the asset (please complete one section only)
4a	Where a purchase is being requested please state the price that you are prepared to pay for the building/land that you have identified in Section 2 above: £ 700,000
4b	Where a lease is being requested please specify: (i) The annual rent that you are prepared to pay: (ii) The duration of the lease requested: (iii) Any other special lease terms required:
4c	Where another form of occupancy (not a sale or lease) is being requested please state the price that you are prepared to offer for such rights to use the property:
5	<p>Please summarise below the reasons for making the Asset Transfer request, any special terms and conditions applicable to the request, how you intend to use the Council building/land and any related timescales:</p> <p>The business proposal is to purchase, and operate for community benefit, the old Victoria Primary School buildings – made up of the original listed primary school building, a 2014 build in the grounds known as the Anchor building and the playground space around the buildings which is bounded by stone walls and iron railings. We are calling this project “The Heart” – see Appendix 1 for boundary.</p> <p>The principal purpose of “The Heart”, as proposed, is to facilitate and support greater and more active integration of the rapidly expanding Newhaven community. “The Heart” will develop and deliver activity under three themes, established through engagement with the local community.</p> <ul style="list-style-type: none"> • Culture and Heritage • Learning and Enterprise • Community Activity and Wellbeing.

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	<p>In addition, our overarching approach is holistic and underpinned by a commitment to intergenerational practice so that every proposed activity will have multiple outcomes.</p> <p>In addition to the capital investment in “The Heart”, there is an associated commitment to community development led by the Heart of Newhaven Community organisation, including proposals for a consortium of local stakeholders to guide broader developments in “The Heart” and across the area of benefit. This will ensure that the community continues to lead the development of the project.</p> <p>Phase 1 would involve establishing nursery provision in the Anchor Building which would not only meet as soon as possible, that particular need but also presents the greatest potential as a source of income early in the period after opening. It would also offer the opportunity for partners to begin to collaborate on small projects using intergenerational practice to bring generations together to share skills, knowledge and company. This would include the use of the outside space for a range of age friendly activities including growing opportunities.</p> <p>Phase 2 would itself see a phased establishment of use of the main building as follows:</p> <p>Ground Floor <u>Community use</u>, e.g.</p> <ul style="list-style-type: none"> ● Café with exhibition space. This would provide a social area to bind together all the activities and people within the building. ● Rehearsal and performance space. ● Workshop. This could be combined with a “messy making room”. ● Artists’ studios/SMEs. ● Community activities space. We will provide a multi-purpose community use space, for classes and educational activities, with an intergenerational approach plus a touch-down space for advisory and support services. ● The original building dating from 1845 is Grade B listed with many original features (as described earlier) making the school an impressive and virtually complete example of its type. Maximum and creative use will be made of the ground floor to tell the 'Newhaven story' with contributions curated by all our partners and the community members they support. <p>Mezzanine Floor These spaces are generally suitable for co-worker’s office spaces or as artists’ studios</p> <p>First Floor Heritage Suite in which a ‘Newhaven Museum’ would be a central feature. There would be further existing heritage organisations sharing this floor ideally with few physical barriers between them, creating a seamless visitor experience.</p> <p>Second Floor Business suite</p>
6	Date of Submission to the Council: 21 st February 2020

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PART A – About your organization.

A1.1	Organisation Name, Location and geographic areas of current operation:		
	Heart of Newhaven SCIO		
A1.2	Organisation postal address:		
	% 132 Trinity Road, Edinburgh. EH5 3LA		
A1.3	Organisation Contact details for this request:		
	Name	Rodney Matthews	
	E-mail	chair@heartofnewhaven.co.uk	Tel. Number 07749 710369
A1.4	Organisational Governance – State the type of organisation you are, for example a registered charity or a registered company. If your agency is not a registered charity or company, please state if you have a Constitution / Statement of Aims / Memorandum and Articles (relevant documents must be supplied on request)		
	SCIO		
A1.5	OSCR Registration Number (if your organisation is a charity registered in the UK and/or Scotland):		
	SC049919		
A1.6	Companies House Registration Number if applicable		
	N/a		

PART B – Your proposal for use of the asset

In summary, please answer the following questions relating to your proposal (please ensure that you attach your full Business Plans as this will provide further detail)

NOTE: the term ‘the asset or asset’ means the Council-owned asset which is the focus of your submission

	Assessment of the operational and market environment
B1	Please summarise below any history that your organisation has for; (i) delivering good quality services, (ii) meeting the needs of your community and (ii) enabling sustainable growth of your organisation?
	i) The Heart of Newhaven SCIO has been established by the community of Newhaven to take forward their vision of acquiring VPS as a vital community asset which will belong to - and promote - the Newhaven community This vision was born out of two well-attended public meetings from which an initial Steering Group was established early in 2019 to

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explore this vision further . Although we are newly-established and therefore have no record of service delivery as a group, we have shown that we can work well in partnership by to date

- Developing a high level three year Strategic Plan to: ensure planning is consistent with local and national priorities: clarify the short, medium and long term outcomes for the proposal and activities to achieve these: scope out risks and risk responses and identify a range of key performance indicators against which to evaluate success
- Securing funding from Awards4All and the Neighbourhood Partnership to enable us to appoint Planning Aid Scotland (PAS) to undertake extensive community consultation (Appendix 3.)
- Securing funding from Asda Foundation to support an engagement event.
- Securing funding from Scottish Land Fund to appoint consultants to work with us to develop a sustainable Business Plan
- Attracting over 700 local individuals to sign up in support for the initiative.
- Making contact with over 70 locally based organisations who have all supported the proposal with nearly 20 confirmations of interest in using space within the building.

The sustainable business case is based on the collaborative approach we are developing with partners who themselves have strong track records in the delivery of services and activities that support the vision expressed in our Strategic Plan, namely to develop “a vibrant, age friendly building which encourages, develops and delivers inclusive activities which seek to promote and improve wellbeing”.

The primary objective is to create opportunities for people of all ages, from all walks of life and interests, to come together to experience, share and exchange culture and heritage, learning, skills, expertise and enterprise in an accessible and welcoming environment.

Our partners include:

- The History of Education Centre,
- Men’s Shed
- Forth Children’s Theatre
- Coburg House Art Studios
- North West locality lifelong learning
- Newhaven Community choir
- Daddy Day Care

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	<p>ii) Each of our partners can evidence how they meet the needs of the local community. Our Business Case demonstrates how by working collaboratively we can maximise the benefits to the community and enable the sustainable growth of the organisation. Appendix 5 details some of the partners.</p> <p>iii) The experience of the trustees ensures that both financial sustainability and social impact are constantly at the forefront of the enterprise. The business plan and financial projections show that by year 3 of operation “The Heart” is expected to return a surplus of circa £50k per year, rising by around 5%, once the tram line opens. Good governance and strong financial controls are in place and all involved are highly experienced in delivering for sustainability.</p>
B2	<p>Is there a strong business-fit between the core objectives of your organisation and the proposed use of the asset?</p>
	<p>Yes.</p> <p>The core objectives of the organisation are the following (OSCR registered) charitable purposes:</p> <ol style="list-style-type: none"> 1. the advancement of education and social welfare principally within the Community 2. the provision of recreational facilities principally within the Community 3. the advancement of arts, heritage, culture and citizenship principally within the Community 4. to promote, establish, operate and/or support any other charitable projects for the benefit of the Community: and 5. to foster a community spirit for the achievement of these aims and other similar aims as may by law be deemed charitable <p>The proposed uses for the building are based on the community consultation stakeholder events and additional research by PAS (Planning Aid Scotland) which identified (Appendix 3a and 3b) the following three broad themes under which the development of a community resource within Newhaven could be taken forward:</p> <ul style="list-style-type: none"> ● Culture and heritage ● Learning and Enterprise ● Wellbeing <p>Geographically, the “area of benefit” for this proposed community resource sits across both the North-East and North-West localities and therefore we have taken cognisance of the Locality Improvement Plans for both areas.</p> <p>See “Area of Benefit” Map of ‘Community’ at Appendix 4</p> <p>Both Locality Improvement Plans (LIPs) of City of Edinburgh Council used a consultative process to determine the 5 priorities:</p>

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- employment, training and education
- place
- community safety
- children, young people and families
- health and wellbeing

Our three themes directly support and contribute to meeting these priorities.

An options appraisal of the three themes has been undertaken by SKS, consultants appointed by HoN to assist in the development of a Business Plan. The appraisal found that by using economic modelling, market research and follow up with community groups a combination of uses could be identified which taken as a whole, provide a model for the future operation of the building which delivers a variety of community benefits and opportunities for financial sustainability.

- **Culture and Heritage:**

- A museum reflecting the heritage of Newhaven being a central feature of a 'Heritage suite' complemented by the relocation of The Victorian Classroom with its collection of artefacts representing the history of education and further development of the existing 'Wee Museum'
- The collaborative partnership approach with The History of Education Centre, Victoria Primary School, Men's Shed Leith
- the relocation of Forth Children's Theatre, which is looking for rehearsal space, storage and workshop space
- The Shoreline Project will offer training and education to all generations and highlight paths to potential employment. It will contribute to placemaking, support community safety by improving engagement with local groups and will help to equip young people with suitable 'life skills'

- **Learning and Enterprise:**

- An Early Years Centre in the Anchor Building will support the CEC targets for provision of preschool childcare and is an important and valuable contribution to the economic development of Newhaven and to child and family learning
- The provision of artists' studios and co-working spaces will support social enterprise, training in hi tech and the creative sector. We know that demand for such space far outstrips supply and are confident that the nurturing ethos we will strive to offer will be an effective incubator for successful businesses of the future
- In addition, we will be working in partnership with existing local businesses to maximise the potential benefits of tourism. This will link to our Heritage and Culture theme and build on an existing relationship with Cruise Forth/ForthPorts. It will support the Locality Plan's economy/employability priority to 'develop the North East offer for inward investment including targeted investment in digital industry, develop tourism opportunities in the North East locality to create jobs and diversify the city tourism offer'

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	<ul style="list-style-type: none"> ● Community Wellbeing <ul style="list-style-type: none"> ▪ To include working in partnership with local expert providers who have already told us that they are looking for additional accommodation for their services e.g. Men’s Sheds ▪ It also recognises the wellbeing outcomes offered by the provision of informal sociable spaces for local groups and individuals ▪ The opportunity to develop an intergenerational centre that could be used by all generations for social, creative activities is being actively explored. Working in partnership with local agencies we want to create a centre offering services, activities and opportunities to all ages that would in turn support the Health and Wellbeing priorities in the Locality Plans such as combatting loneliness and isolation, offering opportunities to increase physical activity and improving access to health and support services <p>As detailed in the Business Case these potential uses have been categorised as <u>Community use</u>, <u>Third Sector use</u>, <u>Commercial Use</u> and <u>Combined Use</u> with varying rental rates i.e.</p> <ul style="list-style-type: none"> ▪ Community Use – Examples include Men’s Shed, workshop space, community groups, training/learning for local community. May be charged at typical letting rates for the area ▪ Third Sector Use – Examples include artists’ studios, heritage offer, Youth Theatre. May be charged at typical rental rates for Edinburgh ▪ Commercial Use – Examples include private sector office space rental, co-working space. May be charged at typical lease rates for Edinburgh ▪ Combined Use - Examples include pre-school childcare, café or other commercial use with strong community benefits. May be charged at a rate close to commercial rates
B3	<p>How will your organisation’s current operational capacity and financial turnover be affected by taking forward your proposals for the asset?</p>
	<p>The primary objective of Heart of Newhaven SCIO is to acquire the Victoria Primary School by CAT from CEC for the continuing use by the local Community. As a new organisation the Trustees have the advantage of being able to be fully focused on that objective and will be throughout the project.</p> <p>The Trustees do not currently employ any staff and work is carried out by the Trustees and other volunteers with additional expertise brought in where required. Heart of Newhaven SCIO is not now, nor will it be in future, engaged in any other significant activities which would affect its performance in relation to the acquisition of the Victoria Primary School. As part of plans for the future sustainability we would look to explore the employment of staff in different operational roles, giving job opportunities and freeing the Board to concentrate on strategic matters.</p>

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	<p>The current financial assets of the Heart of Newhaven SCIO are shown in the attached financial statement.</p> <p>Once the asset has been acquired by CAT from CEC, further funds will be required to convert the premises to make them better suited to the Community use. As well as applications to major funders, we recognise the importance of income generation to ensure financial sustainability. We believe that the income that will be generated through our phased approach will allow the main school asset to be developed stage by stage Further details are given in the attached Business Plan page 42.</p> <p>Details of the projected cash flow for the Heart of Newhaven SCIO for the first 5 years of operation are shown in the Business Plan page 25.</p>
B4	<p>Please evidence below, the strength of leadership and skills of the Board and staff of your organisation to maximise the prospects of the asset? If the skills are not currently in place, please describe how you intend to address this.</p>
	<p>Our application to become a SCIO was accepted by OSCR in February 2020. The members of the current Steering Group will be the first Board of Trustees. As Heart of Newhaven continues to grow, additional experienced Trustees will be co-opted to the Board.</p> <p>Our experience is as follows:</p> <p>Rodney Matthews (Chair and Trustee) has professional experience as a quantity surveyor before long service as a Christian minister encouraging cooperation between churches throughout the UK and Europe for which he was appointed MBE in 2001. He is skilled in - and enjoys - working with people and acting as negotiator and is passionate about putting the “heart” at the centre of this project</p> <p>Colin Macneill (Trustee) is a corporate lawyer with over 25 years experience working in private practice. He is an elder in Newhaven Church with an active involvement in the life of its congregation, and also a charity trustee of the National Piping Centre in Glasgow</p> <p>Anna Stirling-Aird (Trustee) is a full time mother of three children, prior to this she worked as a physiotherapist in the NHS for 10 years and has a keen interest in the health and well being communities</p> <p>Jennifer Marlborough is a retired nurse lecturer having worked as Post Basic Education leader at South Lothian College of Nursing followed by 18 years in position of Head of Learning and Development and SVC Co-ordinator at Alzheimer Scotland. An elected member of Leith Harbour and Newhaven Community Coun for 5 years, currently as Secretary a post held for 3</p> <p>Stephen Rooney (Treasurer) was the CEO of software companies for over 30 years He was also a Business Mentor working with startup companies. He has been the Treasurer and Trustee of both History of Education Centre and the Scottish Chamber Choir</p> <p>Judy Crabb, a Town Planner by profession has worked in the Voluntary and Community sector for around 30 years. Roles have included CEO, Business Development Manager</p>

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and Funding Officer with experience of working on projects in England, Wales and Scotland. Judy also volunteers with a number of local charities and serves on the Community Council

Christine McDerment is a widely travelled, retired journalist. She has been a Trustee with the History of Education Centre (Lothian) SCIO, where she originally began in a volunteering role, for around nine years now. She also volunteers with Lothian Sound, the Edinburgh-based Talking Newspaper for the Blind

Lynne Porteous, now retired, was a senior manager in Edinburgh's Children and Families department, latterly heading up the Planning and Performance team. Prior to that she had a long career in community development, managing people, projects and buildings within the statutory and voluntary sector. She is also a qualified life coach and volunteers regularly with Cancer Research UK

Alan Hartley is a chartered accountant by profession having worked for KPMG for over 30 years. Currently Chair of Mactaggart and Mickel (a £100m turnover company) and involved in different capacities in a number of charities: Scottish Cancer Foundation (chair): Raida Trust, Mickel Fund, Watson's Benevolent Fund, Chest, Heart and Stroke Scotland

Roger Walpole lives in Newhaven and is the Treasurer of the current Victoria Primary PTA and Parent Council as well as being a Trustee of the Victoria Charitable Trust. He works at the University of Edinburgh as an Event Production Manager. He has a background in community and professional theatre as well as major festivals.

Norma Johnston is a Solution Focused Counsellor who volunteers with CrossReach Counselling Lothian. In a former life Norma's career was with the Post Office in a variety of roles. She has a particular interest in mental health and wellbeing and in the connection between diet and anxiety and depression

David Scott is a practising architect who has lived and worked in Newhaven for over 20 years. After graduating he worked in London for a number of years before setting up his own architectural practice in Edinburgh. He has experience of working with community groups and housing associations and is currently working on a new yoga centre in Edinburgh

Mhairi Scott is a final year postgraduate MSc student in the design of communication, aiming to use her training for sustainability projects as well as cultural and natural attraction. She has worked with and been a volunteer for Changeworks (environmental charity) and currently volunteers for the Borders Forest Trust and fundraises for the local school

Joan Davidson is the Head of Learning for Edinburgh Science (one of Europe's largest science festivals), member of Festival Edinburgh's Community and Education Working Group and of the external advisory group for the Scottish Government's STEM strategy. She currently sits on the board of the Scottish Outdoor Education Centres

We have recently carried out a skills audit and agreed that whilst we have a good range of skills and experience we have a need to add additional expertise to our communications team. A role description for a Marketing, Communications, Public Relations Trustee is currently being advertised. Role descriptions for trustees will be agreed following Trustee training which is being arranged.

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	<p>We meet monthly to review and plan and make use of task-specific Working Groups meeting as required.</p> <p>Trustees together are responsible for governance and the strategic plans.</p> <p>The constitution allows for individuals to be co-opted to the Board on a temporary basis to cover specific skills gaps if particular issues arise. We are also in the process of developing an Advisory Group which will comprise individuals who are able to offer expertise & advice to the Board when needed but who will not be Trustees. This group will include e.g. an HR specialist, an accountant, a property lease negotiator, local head teachers, and managers of other locally based charities.</p> <p>The current board is strengths-based, well- connected, entrepreneurial and committed to serving the community of Newhaven. Future staff and board members, as outlined above, will be recruited through an open process with an interview panel, consistent scoring system and probationary periods. They will have an induction and on-going training and personal development opportunities in line with organisational needs</p>
B5	<p>Please detail how you intend to evidence long-term community benefit arising as a result of the proposed asset transfer?</p>
	<p>We are committed to partnership working and will continue to build relationships which enable the sharing of skills and resources in a climate of understanding, trust and respect.</p> <p>We will evidence the long term benefit arising from our partnership by developing with our partners a range of evaluation methods. We will establish which base lines are appropriate for which outcomes and how we can assess and record them. Our partners have their own evaluation methodologies and we will work with them to develop a monitoring and evaluation framework to evidence our collective progress against our shared vision and agreed short, medium and long term outcomes at regular intervals.</p> <p>Within 5 years our sustainable business plan will enable us to achieve and evidence the following outcomes:</p> <p>Our themes support all six themes of the Council Business Plan.</p> <p>Our theme of Culture and Heritage will include activities such as developing the centre as a tourist 'destination' that supports the <i>Business Plan priority of 'Delivering an economy for all'.</i></p> <p>In particular our proposal for including artists' studios and co-working spaces will support the Council's ambition to 'create the conditions for businesses to thrive. Invest in supporting businesses, social enterprise, training in hi tech, creative and other key sectors including co-operatives. Help link business with young people to ensure the workforce of the future is guaranteed work, training or education on leaving school.'</p>

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	<p>Our theme of Learning and Enterprise will include intergenerational activities exploring ‘placemaking’. Other partnerships such as with Edinburgh Shoreline Project will look at local environmental issues, supporting the <i>Business Plan priorities of ‘Developing a sustainable future’</i></p> <p><i>‘Delivering for our children and families – improving lives and futures’</i> will be supported by the collaborative approach of our partners to work with providers of Early Years services.</p> <p><i>‘Delivering a healthier city for all ages – strong and vibrant communities ‘</i> will be supported both by our theme of Learning and Enterprise and our theme of Community Wellbeing. As in all our proposed activities we will seek to work in partnership with existing providers such as Ageing Well to extend provision to groups and individuals not yet engaged.</p> <p><i>‘Delivering a Council that works for all – more empowered, transparent, and improved public services’</i> will be supported by the many opportunities we will create to increase confidence and empowerment across generations.</p> <p>The wider economic and social benefits including rate of return can be found on page 28 of our Business Plan</p>
B6	N/A
	N/A
B7	<p>Please summarise below the partners involved in your proposal, describing the current and future strength of partnership work in the context of the submission and if so, is this influencing the operational arrangements for the asset?</p>
	<p>All partners will be delivering activities that support at least one, though preferably all three, of our themes and we are in the process of developing collaborative projects to maximise community benefits.</p> <p>Our key partners are as follows:</p> <p><u>The Men Of Leith Men’s Shed</u> established in 2016 currently has over 25 active members attending 2 half day sessions with a regular attendance of around 10/12 members to each session and another 8 men who attend our music group. They will contribute to the Heritage and Culture theme by sharing traditional craft skills and experience, to Learning and Enterprise by sharing a workshop/ messy area with Forth Childrens’ Theatre and delivering in collaboration workshops and activities and to Wellbeing, by the support they provide in respect of mental wellbeing</p>

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The History of Education Centre has been providing a valuable and engaging service for over 30 years and is always in the Top Ten places to visit on Doors Open Day each September when classes are run throughout the day.

'To be based in what is currently the oldest working primary school in Edinburgh would clearly add authenticity to our visitors' experience.

We have also collected a huge number of historical and educational artefacts from various school closures as well as donations from the general public, most of which are currently in storage because of lack of space, which we would be able to display in temporary and permanent exhibitions. Working alongside other heritage groups in Victoria Primary we could provide a valuable centre for culture, heritage and learning.

We could therefore provide the Heart of Newhaven initiative with a permanent heritage hub which has a proven track record of reaching all ages over a wide geographical area of East Central Scotland and would bring regular footfall to the centre.'

Forth Children's Theatre (FCT) has over 100 members and volunteers in a charity-run, free to use, youth theatre that has been going for 42 years based for many of these in the Trinity Academicals annexe at Craighall Gardens. This has now been cited for demolition and FCT has had to move to compromised premises at Madelvic House in Granton.

'The use of the school would be a lifeline for our organisation and the ability for us to share resources with many other local groups would be mutually beneficial. We see this as an exciting cross-generational community opportunity to really inspire the Newhaven village and its many community groups of which we are one. We are strong advocates of this initiative and welcome this next phase of its development.'

Coburg House Art Studios has been established for over 20 years providing studios for the artistic community with 53 studios over four floors and an artist shop and gallery with 80 artists in the building ranging from graphic designers, web designers, a weaving school, painters and jewellers.

The building is now full and has a large waiting list

'We have been very impressed with the professionalism and dedication of Heart of Newhaven and would like to participate in their project at Victoria School. We have visited the site and given presentations to the community gatherings and we could see a part of the building being used for studios. This would require very little building work and could be achieved very quickly and would help to cement a loyal and dedicated group into Victoria school as part of your overall goal to achieve the reuse of this fantastic building as a community hub.'

The Ageing Well Project is run by Edinburgh Leisure in partnership with NHS Lothian, and delivers a range of city-wide activities which support people to become, and remain, active in later life. The emphasis is on meeting new people and making physical activity accessible and enjoyable. All our activities are subsidised with voluntary contributions starting from as little as £1. Each activity is followed by refreshments and time for that all-important chat and a cuppa, which is often the most valuable part of our sessions!

We are passionate about physical activity; we see the positive impact physical activity has on individuals' and communities' physical, mental and social health and well-being and we

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believe working with partners at the Heart of Newhaven will not only increase the connectivity of older adults in the community but also children and those new to the area. Partnership working with third sector organisations is key for us to the ongoing development and maintenance of communities, such as Newhaven in Edinburgh. We believe that physical activity (and other activities) should be accessible to all - no matter where you live, what your background is or what your personal story may be. We know that there are individuals within our city who require additional support and/or care, but being able to access a community facility within the area, where many of them grew up, will make that task less daunting than it would normally be. The vision that Heart of Newhaven has is an inspiring one, and something that we want to be involved in. The benefits of a thriving hub in this iconic building in this area would be priceless

Daddy Daycare Edinburgh was created in 2014. The company has three after school clubs, supporting five schools looking after over 130 children a day. Daddy Daycare currently employs 18 staff, provides apprenticeships for school leavers and training opportunities for all ages. It has been supporting Wardie, Trinity and Victoria Primary since 2015 when the first club was opened so has a very positive and strong reputation within the Newhaven community. Every service Daddy Daycare has opened has received a 5 star rating from the Care Inspectorate which is the highest rating a new service can be awarded.

Daddy Daycare proposes to hire the Anchor Building on the current Victoria Primary site from Heart of Newhaven on a commercial lease. They will then register a service that will provide care for children aged 3+ and make the necessary adjustments to the Anchor building which will allow them to open. The size of the building would allow provision of care for around 75 children a day, the majority of these children would be aged between 3-5yrs old. *‘It is our intention to make this service the first pre-school nursery that brings generations together by offering intergenerational care. Intergenerational care has great benefits for reducing depression and isolation in the older generation, It can also help with greater mobility and physical skills. For the children it helps them develop empathy and their language and communication skills. ‘*

Appendix 5 includes all the confirmations of partnership support.

.....

In summary:

Anchor Building

Early Years provision. This separate building provides readily defined space for this use. It is purpose built for small children needing minor work on the toilet block and additional kitchen facilities and would offer discrete and safe access for parent, carers and children

As City of Edinburgh Council is not presently able to meet Scottish Government targets for provision of preschool education and childcare, the increase in availability of pre-school

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childcare enabled by “The Heart” would be an important and valuable contribution to this target and to the economic development of Newhaven and child and family learning. The area around the building will be used for age friendly activities including growing opportunities

Victorian building (old school building)

Ground Floor. The original building dating from 1845 is Grade B listed with many original features (as described earlier) making the school an impressive and virtually complete example of its type. Maximum and creative use will be made of the entire ground floor to tell the 'Newhaven story' with contributions curated by all our partners and the community members they support

Community use, e.g.

- Café with exhibition space. This would provide a social area to bind together all the activities and people within the building. A franchise model may work best, to reduce workload, complement existing local provision and guarantee income.
- Rehearsal and performance space. The main school hall would make a perfect rehearsal venue. Forth Children’s Theatre is looking for a permanent home for its rehearsal sessions and costume storage. Newhaven Community Choir also needs regular rehearsal and performance space
- Workshop, which could be combined with a “messy making room”. Men’s Shed Leith are looking for a permanent home for their workshop, which could be combined with the theatre scenery workshop. The theatre group has a supply of tools and the Men’s Shed committee have the skills; combined they could provide workshops for the community. Edinburgh Sculpture Workshop (ESW) already runs successful studios, workshops, exhibitions and a cafe based in Newhaven, but is at full capacity. There is demand for more workspace and teaching areas that could be fulfilled at “The Heart”. ESW has also suggested the idea of an artist in residence, which they could help facilitate.
- Artists’ studios/SMEs. There is a lack of such space locally. Coburg House which has a waiting list of around 300 feels that ‘provision would require very little building work and could be achieved very quickly with artists contributing to the collaborative ethos of the project as a whole’.
- Community activities space. We will provide a multi-purpose community use space, for classes and educational activities, with an intergenerational approach plus a touch-down space for advisory and support services. Planning Aid Scotland’s community consultation (Appendix 3) has identified numerous groups who need space to run their activities including: Multi-cultural Family Base, St Columba’s Hospice, Edinburgh College, Generations Working Together, Goosander Residents’ Association / Quay Housing Association, several local care homes, Citadel Youth Centre, Newhaven Church

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	<p>Mezzanine Floor These spaces are generally suitable for co-workers' office spaces or as artists' studios</p> <p>First Floor Heritage Suite. A collaboration between existing heritage organisations sharing this floor ideally with few physical barriers between them, creating a seamless visitor experience. Partners include the History of Education Centre, Victoria Primary School, City of Edinburgh Archives, City of Edinburgh Museum service, Edinburgh Shoreline Project, Men's Shed Leith. We would welcome Newhaven Heritage to bring their expertise to this collaboration</p> <p>Second Floor Business suite at commercial rates.</p>
B8	<p>Please describe the governance arrangements which will oversee the operations of the asset. If this is to be separate to arrangements for your organisation, please provide further description and include diagrams if necessary. Please also describe how accountability for the asset will be provided for.</p>
	<p>The Board of Trustees are jointly and severally responsible for the overall governance and strategic direction of the SCIO (Scottish Charitable Incorporated Organisation), and financial health, probity of its activities, developing Heart of Newhaven's aims, objectives and goals in accordance with the governing document, legal and regulatory guidelines. All trustees (after having attended training with EVOC) are aware of, and understand, their individual and collective responsibilities. They meet on at least a monthly basis. Our business plan includes provision for suitably qualified and experienced staff to be employed to manage the building on a day to day basis. This will include building maintenance as well as service delivery.</p> <p>Main Trustee Responsibilities:</p> <ul style="list-style-type: none"> ● To ensure that Heart of Newhaven, and its representatives, function within all legal and regulatory requirements applicable, and in line with the organisation's governing document, continually striving for best practice in governance ● To maintain the fiduciary duty invested in the position, undertaking such duties in a way that adds to public confidence and trust in Heart of Newhaven ● To take appropriate professional advice in all matters where there may be a material risk to Heart of Newhaven, or where the trustees may be in breach of their duties ● To determine the overall direction and development of Heart of Newhaven through good governance and clear strategic planning ● To avoid any personal conflict of interest ● To manage and use the resources of the charity to optimise its potential. To ensure that robust systems are in place for internal financial control and the protection of funds and assets

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- To undergo a thorough induction upon appointment and ongoing training to remain alert to, and aware of, their duties and responsibilities, and of the environment in which they operate
- To achieve the purpose of Heart of Newhaven and to pursue the charitable objects and provide public benefit

Main Duties:

- Ensuring Heart of Newhaven complies with legislative and regulatory requirements and acts within the confines of its governing document and in furtherance to the charitable objects
- Acting in the best interest of Heart of Newhaven, beneficiaries and future beneficiaries always
- Promoting and developing Heart of Newhaven for it to grow and maintain its public benefit and recognising the situation when it may be more appropriate to wind the charity up where there is no longer a need for the charity to provide the services it does or because the charitable objects are no longer relevant to contemporary social situations
- Maintaining sound financial management and control of the charity's resources
- Ensuring a fully effective and appropriate system for the recruitment, appointment and monitoring of the work and activities of paid members of staff
- Ensuring the effective and efficient administration of the charity and its resources, striving for best practice in good governance
- Acting as a counter-signatory on Heart of Newhaven cheques (including any electronic transactions) and any applications for funds
- To maintain absolute confidentiality about all aspects of the trustees' business, bearing in mind the overriding legal obligations placed upon trustees

Statutory Duties:

The following is a précis of the legal duties Directors must fulfil:

- Duty of trust;
- Duty to comply with the charity's governing document;
- Duty to act in the best interests of the charity, present and future beneficiaries;
- Duty to avoid conflicts of interest;
- Duty to safeguard assets;
- Duty not to benefit from their position;
- Duty of care; • Duty to act personally; • Duty to act collectively;
- Duty to keep accounts. For charitable companies, directors and trustees also have specific legal duties under the Companies Act 2006.

Accountable to:

As the Board is responsible and liable for the governance and functioning of Heart of Newhaven, they are accountable in varying degrees to a variety of stakeholders, including: members, beneficiaries, funders, and OSCR.

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	<p>The Board feeds back to the members at the AGM and will hold regular steering group meetings with the members to ensure the organisation remains led by the community of members.</p> <p>Reports from other funders will be submitted as required.</p> <p>As well as managing the organisation the Trustees understand that they also have a duty to manage the building itself. This has been included in our financial projections. A suite of policies is being adapted from those used in other centres.</p> <p>Regular staff and tenant training will take place to ensure everyone knows and follows all relevant procedures and policies.</p> <p>Professional services will be bought in as required to ensure compliance in all relevant areas: PAT testing, firefighting equipment, lift servicing, legionella testing and all other statutory duties will be met.</p>
B9	<p>Please evidence how you know that your proposals for the use of the asset are supported by and meet the needs of the wider community and City. You should describe the level and nature of support for the request from the community.</p>
	<p>Appendix 3 details the extensive community consultation we have carried out.</p> <p>The Business Plan - pages 33-35, details the research and analysis we have carried out in terms of the needs for the rental spaces.</p> <p>Page 38 of the Business Plan, summarises the contribution our proposal makes to local, regional and national priorities.</p>
B10	<p>Where applicable, please detail how your proposals for use of the asset will enhance the existing use of the building/land</p>
	<p>Victoria Primary School is the oldest working primary school in Edinburgh.</p> <p>The original building dates from 1845 (originally designed by James Lessels and later extended in 1874 and 1875) and has its exterior intact. It has original timber sash and case windows, a relatively unchanged interior retaining timber boarded dado panelling, iron radiators, stone stairs, cast-iron banisters and double height hall; these features make the school an impressive and virtually complete example of its type.</p> <p>It is a Listed Building (Grade B) and an iconic feature of Newhaven Conservation Area, much loved by the local community. A new school is being built to fit the needs of education needs of the 21st Century – our plans will ensure that this part of our Newhaven history will have a new life, whilst maintaining and enhancing its original heritage.</p> <p>The proposed uses are entirely appropriate to the existing use.</p> <p>Newhaven is a growing community and residents have told us of their concerns that the original heritage will be lost and not shared. People of all ages have spoken of the need to have a welcoming inclusive local venue that will ensure that the building and its setting remain at the heart of the growing community.</p>

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	<p>The redevelopment of Victoria Primary School into The Heart will deliver the following outcomes:</p> <ul style="list-style-type: none"> ● The rapidly expanding housing developments have an active and engaging offer at its heart to encourage integration and the creation of a sense of community with the existing population of Newhaven. ● Newhaven will be a more attractive place to live and work. ● Increased use of active travel routes ● Increased local employment opportunities ● Increased use of “The Heart” by community organisations, and an increase in the number of community organisations using “The Heart”. ● Increased social cohesion, well-being and safety in Newhaven and surrounding areas where people choose to engage. ● Local people are better informed and educated about the cultural heritage and better able to participate in its management ● Increased and improved opportunities for the education of young people, including those at risk of exclusion. ● Local people are better able to access amenities and services
B11	<p>Please outline how your proposals take account of the influence of local and city market forces and (i) if so are there plans in place to ensure that your proposals for the use of the asset are competitive in order to sustain the asset, (ii) if not please explain why.</p>
	<p>In 2020, 45 Cruise ships with over 60,000 passengers and crew will arrive in Newhaven Harbour. Market research suggests that tourists are becoming more adventurous and not just visiting the main tourist attractions. The number of visits to free museums and galleries is almost three times that for paid museums and galleries. “The Heart” can benefit from this trend, by attracting those that would normally bypass Newhaven on their way to central Edinburgh.</p> <p>The Newhaven area is about to see a near doubling of its population over the next decade.</p> <p>The market analysis undertaken is on pages 12 - 20 of our Business Plan which concludes: <i>‘There is limited supply of community space in the Newhaven area, mainly church hall/room facilities. This means that the development will have little or no negative impact on other facilities. “The Heart” offers a different kind of provision which more actively seeks to support community activity, and to link community organisations together to provide a greater and more holistic range of activities.’</i></p> <p>Overall, (see Business Plan page 25) “The Heart” has a positive income and expenditure model which, whilst short of meeting purely commercial expectations, can deliver positive cash-flow from its inception. This involves careful timing of expenditure against income and the assumed use of volunteers for some roles (which is a positive feature of this community focussed project).</p>

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	<p>The modelling allows for the accumulation of 2% per year of the £1.9m direct capital costs (including purchase and works identified in the building report) to build up an exceptional maintenance fund for replacement of major items and future modifications. This equates to circa £38k per year. After allowing for this, “The Heart” generates a surplus each year from year 3 and has recovered the cumulative deficit on the exceptional expenditure fund by year 7.</p>
B12	<p>If suitable, is there marketing and development plan in place for the asset for the next five years? If so, please provide further details in relation to your approach</p>
	<p>A marketing and development plan is being developed which will include:</p> <ul style="list-style-type: none"> • USP • Branding messages • Activity partners • Website development • Social media • P.R. • Advertising • Networking • Signage • Email marketing • Open days <p>The marketing campaign will commence 6 months prior to Heart of Newhaven’s opening date. Full details are in Appendix 12 of the Business Plan</p> <p>Different campaigns will target customers for the various activities within the building.</p> <p>COMMUNITY TARGET</p> <ul style="list-style-type: none"> ● Clubs / groups that will rent the space for their meetings ● Individuals who want to attend activities run within the building ● People who live in or near Newhaven ● Parents with young children and retirees during the day, mixed age groups outside working hours <p>OFFICE SPACE TARGET</p> <ul style="list-style-type: none"> ● Organisations that see an advantage in not commuting to Edinburgh ● Third sector organisations that see an advantage in being clustered together ● Smaller businesses that may currently work at home ● Organisations with a customer base in Newhaven <p>VISITORS TARGET</p> <ul style="list-style-type: none"> ● Cruise ship visitors interested in local history and avoiding the honey-pot destinations ● Schools learning about local history ● Café to service all visitors, to the museum, attending workshops, visiting offices
B13	<p>Please detail evidence of support from the appropriate <u>Neighbourhood Partnership</u>, Councillors, other community leaders and other relevant interests?</p>
	<p>We have had on-going meetings with local elected members, MSP and MP who have been very supportive of our proposal.</p>

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	<p>They have attended and participated in our public meetings and in the stakeholder events held on our behalf by PAS.</p> <p>Our area is covered by two Community Councils which have both confirmed their support - see Appendix 5.</p> <p>The Neighbourhood Partnership has also been very supportive. We received startup funding from them and also a contribution to the cost of our community consultation</p>
B14	<p>Are there any objections to your proposals for the asset that you are aware of? If yes please detail these and how your organizations is dealing with these, if no then please detail how you would handle any concerns should these develop in the future.</p>
	<p>Heart of Newhaven and Newhaven Heritage Centre met on Wednesday 19th February 2020 to discuss their respective Stage One CAT applications and what possible synergy there may be between the two applications. The meeting was facilitated by an independent, volunteer facilitator. During the meeting both parties recognised that they held broadly similar aims, that is to create an important, impactful and viable community resource that will benefit Newhaven.</p> <p>While both parties recognise that there is commonality in their respective aspirations, it was also noted that there were material differences between the two CAT applications and the respective business plans. Despite good will and extensive discussion it was therefore not possible for a resolution to be found at this time.</p> <p>Heart of Newhaven’s application is for the whole of the current campus, both the historical school building and the Anchor Building. Heart of Newhaven’s business plan assumes that the Anchor Building will be used primarily for early years’ provision and that it would not be viable to locate that provision in the historic school building. It should be noted that the current business plan does make provision for a museum within the historic school building.</p> <p>Newhaven Heritage Centre’s application is for only the Anchor Building and not the historic school building. They are developing their Business Plan on this basis. Newhaven Heritage Centre’s belief is that the Anchor Building is ideally suited for their proposed provision of the museum and heritage centre and that there is no suitable alternative space within the historic school building that would accommodate their proposed model of heritage facility.</p> <p>In view of the two different vision for the use of the Anchor Building, and the business plans built around those different visions it was recognised that it was not possible at this stage for the parties to agree a common way forward. Both parties however do recognise the potential for synergy and remain open to further dialogue.</p>

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	Financial Management																																																																													
B15	<p>In relation to your plans for the asset, is the proposed income dependent upon; (i) a single income source, (ii) a dominant income source or (iii) multiple, but inter-dependent sources of income? Please detail below.</p>																																																																													
	<p>Multiple sources of income as detailed in the Business Plan page 25.</p> <p>A key priority as identified by community consultation is the provision of early years education and childcare. CEC has this as a priority but is understood to be struggling to meet their target numbers of places.</p> <p>A service specification will be developed but we already have a confirmed interest from an existing early years provider in establishing provision in the Anchor Building. This will make an important contribution to the supply of local places and at the same time provide a rent of £3k to £3.5k a per month, which presents the greatest potential as a source of income early in the period after opening.</p> <p>Other partners such as Men’s Shed, History of Education Centre, Forth Childrens’ Theatre have confirmed the rental contributions they would be able to make, as has Coburg House in relation to Artists’ studios and co-working spaces as detailed below.</p> <p>Overall, “The Heart” has a positive generated income against operating costs which, whilst short of meeting purely commercial expectations, can deliver positive cash-flow from its inception.</p> <p>This involves careful timing of expenditure against income and the assumed use of volunteers for some roles (which is a positive feature of this community focused project).</p> <p>Income/Expenditure Summary.</p> <p>Revenue Summary</p> <table border="1"> <thead> <tr> <th></th> <th>Year 1</th> <th>Year 2</th> <th>Year 3</th> <th>Year 4</th> <th>Year 5</th> </tr> </thead> <tbody> <tr> <td>Income Revenue</td> <td>£33,750</td> <td>£45,000</td> <td>£11,250</td> <td>£0</td> <td>£0</td> </tr> <tr> <td>Grant Funding</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Community Hire Space</td> <td>£10,800</td> <td>£36,000</td> <td>£36,000</td> <td>£36,000</td> <td>£36,000</td> </tr> <tr> <td>Cafe</td> <td>£4,360</td> <td>£15,261</td> <td>£21,801</td> <td>£22,891</td> <td>£22,891</td> </tr> <tr> <td>Artist Studio</td> <td>£1,877</td> <td>£6,569</td> <td>£9,384</td> <td>£9,853</td> <td>£9,853</td> </tr> <tr> <td>Co-Worker Office Space</td> <td>£1,550</td> <td>£5,426</td> <td>£7,752</td> <td>£8,140</td> <td>£8,140</td> </tr> <tr> <td>Heritage</td> <td>£3,414</td> <td>£11,948</td> <td>£17,069</td> <td>£17,069</td> <td>£17,069</td> </tr> <tr> <td>Offices</td> <td>£5,661</td> <td>£19,814</td> <td>£28,305</td> <td>£29,721</td> <td>£29,721</td> </tr> <tr> <td>Pre-School Childcare</td> <td>£25,834</td> <td>£36,598</td> <td>£43,057</td> <td>£45,210</td> <td>£45,210</td> </tr> <tr> <td>Men’s Shed</td> <td>£1,200</td> <td>£4,200</td> <td>£6,000</td> <td>£6,000</td> <td>£6,000</td> </tr> <tr> <td></td> <td>£88,446</td> <td>£180,816</td> <td>£180,618</td> <td>£174,883</td> <td>£174,883</td> </tr> </tbody> </table>							Year 1	Year 2	Year 3	Year 4	Year 5	Income Revenue	£33,750	£45,000	£11,250	£0	£0	Grant Funding						Community Hire Space	£10,800	£36,000	£36,000	£36,000	£36,000	Cafe	£4,360	£15,261	£21,801	£22,891	£22,891	Artist Studio	£1,877	£6,569	£9,384	£9,853	£9,853	Co-Worker Office Space	£1,550	£5,426	£7,752	£8,140	£8,140	Heritage	£3,414	£11,948	£17,069	£17,069	£17,069	Offices	£5,661	£19,814	£28,305	£29,721	£29,721	Pre-School Childcare	£25,834	£36,598	£43,057	£45,210	£45,210	Men’s Shed	£1,200	£4,200	£6,000	£6,000	£6,000		£88,446	£180,816	£180,618	£174,883	£174,883
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Heritage	£3,414	£11,948	£17,069	£17,069	£17,069																																																																									
Offices	£5,661	£19,814	£28,305	£29,721	£29,721																																																																									
Pre-School Childcare	£25,834	£36,598	£43,057	£45,210	£45,210																																																																									
Men’s Shed	£1,200	£4,200	£6,000	£6,000	£6,000																																																																									
	£88,446	£180,816	£180,618	£174,883	£174,883																																																																									

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B16	In relation to your plans for the asset, are the sources of income sustainable, i.e.; likely to persist over the next few years, or are short-term, or will there be a need for subsidy from another source for example the parent organisation or public funds?
	The Business Plan details our sustainable income. By year 3 of operation, “The Heart” is expected to return a surplus of circa £33k per year, rising to around £38k once the tram line opens. This surplus is sufficient to fund the loan for its ten-year term whilst still generating a £10k surplus in year 3 and £15k from year 4 onwards.
B17	In relation to your plans for the asset, please evidence any trading and other efforts to generate income. Please include any anticipation of bidding for public sector grants/contracts or other funding?
	We have no intention of bidding for public sector contracts. We do propose to bid for a number of other capital funds, and for revenue funding in the early years to help deliver activities to bring the communities of Newhaven together, and to build and sustain the business through marketing and development of appropriate management systems which enable tenants and other users to contribute to the broader goals of Heart of Newhaven through the consortium.
B18	Please describe below the financial relationship between your organisation and your plans for use of the asset. Please include details about implications that there may be for your organization and the asset and how you will manage any risks identified.
	A risk analysis is included in our Business Plan on page 39
B19	Has your organisation ever been investigated on the basis of poor financial management or failure to demonstrate good organisational governance?
	No
B20	Does your organisation currently have operational capital, if yes is this being applied as part of the request, if no, will the proposed asset provide for a financial asset or liability?
	Heart of Newhaven has received a number of small awards and grants to enable us to carry out specific awareness projects within the Newhaven Community. Our working capital has so far been mainly donations we have received from local supporters. The proposed asset will become a financial asset in the medium term.

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B21	<p>Is the request for asset transfer being made in order to add to an existing property asset portfolio for the purposes of continued trading?</p>
	<p>No, Heart of Newhaven does not have any other properties.</p>
B22	<p>Please indicate with an example where the financial aspects of your proposal have been successfully applied elsewhere?</p>
	<p>Heart of Newhaven has looked at a number of local projects that have included the transfer of assets to the local community to enable us to learn from their experiences. Bellfield Church in Portobello (Action Party) and the Bridgend Farmhouse</p> <p>We are also making ‘best practice’ visits with the support of the Community Learning Exchange to three multi use centres in Glasgow as advised by COSS.</p>
B23	<p>Please identify if; (i) your proposals for impacts upon the finances of your organisation and (ii) plans for mitigation if negative issues arise concerning cash-flow, liquidity or financial capacity issues that may impact upon the request?</p>
	<p>We plan to phase the maintenance and modifications to the Victoria Primary School Main building in line with grants that we will apply for. So, if we find that we do not receive the grants then the speed at which the upgrade work can be achieved will be revised.</p> <p>There is the potential in the premises to generate income in a range of different ways as outlined in the Business Plan. E.g. by letting space for Early Years provision, local craft and artists for use as studios, by operating a café.</p> <p>The Board of Trustees will closely monitor the financial position.</p>
B24	<p>How do you intend to continue to operate should any income related to the proposed building/land not be generated as planned? Have you plans for alternative forms of income and/or alternative business model should income streams not continue?</p>
	<p>Our Business Plan outlines a full range of alternative income generation routes that we will be able to choose. So, when one route is producing less than anticipated we have the option to move to another income generation route.</p> <p>The Heart of Newhaven Community has a strong membership and an impressive array of skills and experience skill set amongst those members and in the Executive and Board. Proposals are being developed to establish a broader consortium of stakeholders to guide the development of a programme of activity to maximise the benefits sought from “The Heart”.</p>

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	<p>The range of members of the consortium produces an opportunity for the consortium, or for individual members of the consortium, to access capital and revenue funds that may not be available to the Heart of Newhaven Community SCIO. A key role for Heart of Newhaven Community SCIO is to lead the consortium in identifying, prioritising and coordinating activity to attract additional funding.</p>
B25	<p>What are your plans for the proposed asset should your organisation incur operational difficulties or cease to trade?</p>
	<p>The dissolution clauses in our Constitution state:</p> <p>157. If the SCIO is to be wound up or dissolved, the winding-up or dissolution process will be carried out in accordance with the procedures set out under the Charities and Trustee Investment (Scotland) Act 2005.</p> <p>158. Any surplus assets (including any land acquired by the SCIO under Part 2 or Part 3A of the Land Reform (Scotland) Act 2003 or Part 5 of the Land Reform (Scotland) Act 2016) available to the SCIO immediately preceding its winding up or dissolution must be applied for the benefit of the Community to be used for purposes which are the same as - or which closely resemble - the purposes of the SCIO as set out in this constitution.</p>
B26	<p>How have you factored in the impact of the total ‘on-costs’ for the asset for your organisation, i.e. repair, maintenance, insurance, energy requirements?</p>
	<p>The modelling allows for the accumulation of 2% per year of the £1.9m direct capital costs (including purchase and works identified in the building report) to build up an exceptional maintenance fund for replacement of major items and future modifications. This equates to circa £38k per year. After allowing for this, “The Heart” becomes generates a surplus each year from year 3 and has recovered the cumulative deficit on the exceptional expenditure fund by year 7.</p>
B27	<p>Please summarise below how you have factored in the following in regards to your proposals for use of the asset; market awareness, sales and other income generation opportunities.</p>
	<p>Re market awareness: Information has been gathered through both a community consultation and a full market analysis. Please see Appendix 3 PAS report on Community Consultation which shows the activities people wish to have available.</p> <p>The sustainable Business Plan pages 12 - 20 indicates the market analysis based on the themes confirmed through community consultation.</p> <p>Culture and Heritage The market for artists space has grown in Edinburgh, and the demand for studio space outstrips the supply. The increase in tourism from cruise ships in</p>

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	<p>the Newhaven area would provide additional footfall to the proposed museum area of “The Heart”. The expansion of the Cruise Forth services, and organisation who collaborates with excursion companies, port operators and local tourism businesses to offer tourist experiences at the ports, is testament to this.</p> <p>Learning and Enterprise Businesses are being priced out of the centre of Edinburgh; consequently, demand for office space in the surrounding areas has increased. The Care Inspectorate website lists 20 providers of “Day Care for Children” within a 1 mile radius of Victoria Primary School. The two closest Bonnington House Nursery has places for 103 children and is full. Busy Bees (at David Lloyd) has 58 places and is full most days (won’t have space until Aug 2020) With Newhaven’s growing population, there is demand for pre-school childcare. Even with the current housing levels, parents with a 2-year-old would not be able to get full or part-time pre-school childcare.</p> <p>Community Activity and Wellbeing There are numerous community organisations in Newhaven who have expressed interest in “The Heart’s” facilities. Many groups have established bases, but new groups and changing demands will provide a customer base for “The Heart”. Affordable community space where organisations can build long-term relationships with users, is in demand.</p>
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PART C - Sustainability Impacts

C1	<p>In considering your proposals it is important that the impacts of proposals for use of the asset on the City’s economy, community-wellbeing and environment are identified.</p> <p>Please detail below the impacts upon the following:</p>
	<p>The Newhaven area is generally younger and more multicultural than Edinburgh as a whole with more working people living alone and fewer older people. The continued development of the Waterfront and the renewed housing building programme in the Western Harbour area will present great opportunities for Edinburgh to meet its targets on new housing, access to employment and training, improved early year child care, green travel and responding to climate change if this new development can be successfully integrated into the existing Newhaven community.</p> <p>The Heart of Newhaven makes a meaningful contribution to these wider policy areas as follows:</p> <p>We will support the Scottish Economic Strategy by providing:</p> <ul style="list-style-type: none"> ● Community led economic development ● Job creation ● Workspace development ● Flexible co-worker space ● Meeting space provision <p>We will support the National Volunteering Strategy for Scotland by</p> <ul style="list-style-type: none"> ● Creation of a volunteer led organisation

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	<ul style="list-style-type: none"> ● Development of volunteer opportunities <p>We will support the Scottish Social Enterprise Strategy by</p> <ul style="list-style-type: none"> ● Community led ● Asset ownership ● Trading <p>We will support Sustainable Development by</p> <ul style="list-style-type: none"> ● Ethical sourcing ● Living wage employer ● Active travel options for users of “The Heart” <p>We will support Employability by</p> <ul style="list-style-type: none"> ● Development of learning and training opportunities ● Work Placements ● Peer support opportunities <p>We will support The Community Plan by</p> <ul style="list-style-type: none"> ● contributing directly to four of the six priorities: Green Newhaven; Newhaven Economy; Healthy Newhaven; Engaged Newhaven. <p>We will support the City of Edinburgh Single Outcome Agreement by</p> <ul style="list-style-type: none"> ● Directly addressing SOA issues such as: Economy, health, social enterprise, business start-up, physical infrastructure, employability & regeneration. <p>We will support Scotland’s Agenda for Cities by</p> <ul style="list-style-type: none"> ● Our focus on inclusive growth where community and social enterprise are vital to retain the balance.
C2	<p>Please detail below what you think are the benefits to the Edinburgh economy, please outline both positive and negative benefits that you think may occur:</p>
	<p>Geographically, the “area of benefit” for this potential community resource sits across both the North-East and North-West localities and therefore for planning purposes it is important to take cognisance of the Locality Improvement Plans for both areas.</p> <p>Both Locality Improvement Plans (LIPs) used a consultative process to determine the 5 priorities:</p> <ul style="list-style-type: none"> ● employment, training and education ● place ● community safety ● children, young people and families ● health and wellbeing <p>We will, through activities delivered under our three themes, <u>support</u> all 5 priorities.</p> <p>The wider economic benefits of ‘The Heart’ are generated through expenditure elsewhere in the Newhaven area by visitors to ‘The Heart’ and by the health and leisure benefits accruing from visitors using ‘The Heart’ for something other than their normal place of work.</p>

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These benefits are largely driven by the number of users and visitors to 'The Heart' which is determined by the range of offers available there.

Creation solely as an office space would provide large direct benefits in terms of income but very limited wider social benefits.

Creation solely as a free to access heritage centre could generate great wider economic and social benefits but would not provide sufficient direct economic benefits for it to survive beyond external revenue funding.

The balance of uses which has been determined in the business plan delivers the benefits as set out below.

Details of the visitor numbers are set out set out in Appendix 5 of the Business Plan

External Benefits	Year 1	Year 2	Year 3	Year 4	Year 5
External Net expenditure by visitors to "The Heart"	£8,100	£28,350	£40,500	£40,500	£40,500
Health & Leisure Benefits	£52,500	£189,630	£270,900	£270,900	£270,900
Educational Benefits	£13,593	£47,577	£67,967	£67,967	£67,967
Net Benefits (Costs)	£1,479,733	£152,639	£359,788	£335,641	£48,707

10 year Net Present Value
based on 3.5% discount rate: £924,459

Economic Rate of Return: **80.0%**

C3	<p>Please detail below what you think are the benefits to the community outlining both positive and negative benefits that you think may occur: for example; what the impacts on the local community will be:</p>
	<p>A consistent response in our community consultation was that people wanted a place that would re-unite the Newhaven Community as a family that was made up of those from different cultural and ethnic backgrounds and that was accessible to everyone, particularly those from different backgrounds and those that will be moving into the area in the near future.</p> <p>As the population increases, and new families settle in Newhaven, the availability of childcare and the promotion of multigenerational activities will be key to creating and sustaining community. The redevelopment of Victoria Primary School as "The Heart" to provide much needed community facilities and to help to create a sustainable</p>

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	<p>community for Newhaven.</p> <p>Phase 1 - Establishment of an early years centre will provide the child care places so badly needed in the local area and enable partners to collaborate on activities that could offer support, advice, training and learning to families. The associated age friendly development of the outside space will add further opportunities for improvement in mental and physical well being.</p> <p>Phase 2 - Establishment of activities and services in the main building with all the space it offers to partners who will contribute to our three themes will deliver the following outcomes:</p> <ul style="list-style-type: none"> • The rapidly expanding housing developments have an active and engaging offer at its heart to encourage integration and the integration with the existing population of Newhaven. • Newhaven will be a more attractive place to live and work. • Increased use of active travel routes. • Increased local employment opportunities • Increased in the activities and capacity of community organisations to provide services of community benefit. • Increased social cohesion, well-being and safety in Newhaven and surrounding areas. • Local people are better informed and educated about the cultural heritage and better able to participate in its management. • Increased and improved opportunities for the education of young people, including those at risk of exclusion. • Local people are better able to access amenities and services. • Improved physical health and mental wellbeing for local people. • Reduced social isolation. <p>The wider community will benefit through employment opportunities, additional visitor spend, educational and health and leisure benefits as summarised in the Business Plan see page 11.</p> <p>As far as we are aware there are no negative benefits as we will not, for example, be competing against existing service providers, but rather creating new opportunities</p>
C4	<p>Please detail below what you think are the benefits to the City environment – please outline both positive and negative benefits that you think may occur:</p>
	<p>Reduced car use through opportunities being available locally</p>

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PART D – Summary Budget Information

D1	If appropriate, please summarise the budget arrangements for the requested building/land:		
		Income	Expenditure
	See business plan section 5 Income/Expenditure forecast		

PART E - Other Issues relating to your request

Current financial and other support from the City of Edinburgh Council

E1	Please identify below any investment that your organisation currently receives from the Council:		
		£sum	Purpose
	we do not currently receive any investment from the CEC		
E2	Please identify below any investment that your organisation has attracted from the Council in regards to the proposed transfer of the building/land identified in item 2 above:		
		£sum	Purpose
	Forth Neighborhood Partnership	300	Start up funding
	North West Neighbourhood Partnership	3150	Part funding for the Planning Aid Scotland report and community consultation into the potential uses for the Victoria Primary School
E3	Please identify below any investment in kind that your organisation currently receives from the Council in regards to the proposed transfer of the building/land identified in item 2 above:		
		£sum or equivalent value	Purpose
	As mentioned previously, CEC and Heart Of Newhaven have shared the cost of the Valuation Report that Cushman & Wakefield were commissioned to produce. CEC and Heart of Newhaven shared the cost of £3300	1650	
E4	If receiving investment or other financial support as above, is it anticipated that this will continue for the future and be of benefit in regards to your proposals for the building/land?		

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	<p>Heart of Newhaven was awarded £700 by COSS through their Learning Journeys scheme to enable members of Heart of Newhaven to visit other organisations that have already experienced CAT or similar Buy-Outs to learn from their experience and see how they have transitioned their buildings to community lead success stories.</p> <p>Heart of Newhaven has been awarded £15,120 stage 1 funding from the Scottish Land Fund to enable us to commission SKS to develop our Business Plan including part funding the Valuation Report from Cushman & Wakefield and to commission a Building Survey of the site to determine the extent and costs associated with future maintenance and remedial work on the site.</p> <p>We expect to also receive funding from Scottish Land Fund to purchase the site from CEC and also to assist with the first year post acquisition phase</p>
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Added Social Value

E4	Please summarise below any additional social added value that your proposals may generate (for example; this may include volunteering, new services, improved trading or other initiatives)	<i>Please identify any equivalent social added value (£m)</i>	
	<p>The wider community will benefit through:</p> <p><u>Employment opportunities</u> 4 posts from trading (3 FTE) 41 other posts (35 FTE) facilitated by 'The Heart' redevelopment</p> <p><u>Volunteering opportunities</u> 32 Volunteer posts facilitated</p> <p><u>Additional visitor spend</u> Year 1: £ 8,100, Year 2: £ 28,350 Year 3: £ 40,570</p> <p><u>Educational benefits</u> Year 1: £ 13,593 Year 2: £ 47,577 Year 3: £ 67,967</p> <p><u>Health and leisure benefits</u> Year 1: £ 52,500 Year 2: £ 189,630 Year 3: £ 270,900</p> <p>- as summarised on page 10 in the Business Plan and Appendix 5 of the Business Plan for detail.</p>		

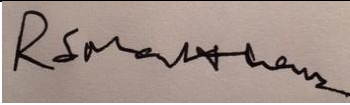
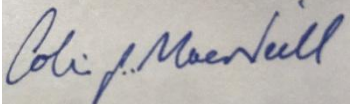

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Submission Checklist

	Please check that you have included the following as part of the accompanying information to your stage 2 submission:		
	Make sure you complete all of these and attach	Yes	No
	Full Business Plan (including financial plans) for the use of the Council-owned building or land	x	
	Most recent Full Year Accounts for your organisation	x	
	Articles of Association/ Constitution/Governance Document for your organisation	x	
	Supporting material from community members or other interests	x	
	Have you read the Council Policy on Asset Transfers?	x	
	Have you read the Guidance for completing the application?	x	
	Have you read the Scottish Government Guidance for Community Transfer Bodies?	x	
	Are you able to prepare public briefing material on your proposal and present at committee	x	

Signing Off

	Please get the following to sign-off your application*:	
		Signature
	Chairperson of your organisation NAME: Rodney Matthews DATE: 21/02/20	
	Senior Director/Committee Member NAME/POSITION: Colin Macneill - Trustee DATE: 21/02/20	
	Name of person submitting the application: NAME/POSITION: Judith Crabb – Committee Member DATE: 21/02/20	

* Signatories in signing the above assess that the information contained within the application form is accurate at the time of submission. In addition, should their request be successful, conditions of transfer will be the subject of separate legal agreement(s) with the Council.