



Asset Transfer Committee

West Lothian Civic Centre
Howden South Road
LIVINGSTON
EH54 6FF

19 February 2020

A meeting of the **Asset Transfer Committee** of West Lothian Council will be held within the **Council Chambers, West Lothian Civic Centre, Livingston** on **Monday 24 February 2020 at 10:00am**.

For Chief Executive

BUSINESS

Public Session

1. Apologies for Absence
2. Declarations of Interest - Members should declare any financial and non-financial interests they have in the items of business for consideration at the meeting, identifying the relevant agenda item and the nature of their interest
3. Order of Business, including notice of urgent business, declarations of interest in any urgent business and consideration of reports for information.

The Chair will invite members to identify any such reports they wish to have fully considered, which failing they will be taken as read and their recommendations approved.

4. Confirm Draft Minute of Meeting of Asset Transfer Committee held on Monday 16 December 2019 (herewith).

Public Items for Decision

5. Asset Transfer Request by West Calder and Harburn Community Development Trust - Report by Head of Finance and Property Services (herewith).

DATA LABEL: Public

NOTE **For further information please contact Eileen Rollo on 01506 281621
or email eileen.rollo@westlothian.gov.uk**

CODE OF CONDUCT AND DECLARATIONS OF INTEREST

This form is to help members. It is not a substitute for declaring interests at the meeting.

Members should look at every item and consider if they have an interest. If members have an interest they must consider if they have to declare it. If members declare an interest they must consider if they have to withdraw.

NAME	MEETING	DATE

AGENDA ITEM NO.	FINANCIAL (F) OR NON- FINANCIAL INTEREST (NF)	DETAIL ON THE REASON FOR YOUR DECLARATION (e.g. I am Chairperson of the Association)	REMAIN OR WITHDRAW

The objective test is whether a member of the public, with knowledge of the relevant facts, would reasonably regard the interest as so significant that it is likely to prejudice your discussion or decision making in your role as a councillor.

Other key terminology appears on the reverse.

If you require assistance, please ask as early as possible. Contact Julie Whitelaw, Monitoring Officer, 01506 281626, julie.whitelaw@westlothian.gov.uk, James Millar, Governance Manager, 01506 281695, james.millar@westlothian.gov.uk, Carol Johnston, Chief Solicitor, 01506 281626, carol.johnston@westlothian.gov.uk, Committee Services Team, 01506 281604, 01506 281621, committee.services@westlothian.gov.uk

SUMMARY OF KEY TERMINOLOGY FROM REVISED CODE

The objective test

“...whether a member of the public, with knowledge of the relevant facts, would reasonably regard the interest as so significant that it is likely to prejudice your discussion or decision making in your role as a councillor”

The General Exclusions

- As a council tax payer or rate payer or in relation to the council's public services which are offered to the public generally, as a recipient or non-recipient of those services
- In relation to setting the council tax.
- In relation to matters affecting councillors' remuneration, allowances, expenses, support services and pension.
- As a council house tenant, unless the matter is solely or mainly about your own tenancy, or you are in arrears of rent.

Particular Dispensations

- As a member of an outside body, either appointed by the council or later approved by the council
- Specific dispensation granted by Standards Commission
- Applies to positions on certain other public bodies (IJB, SEStran, City Region Deal)
- Allows participation, usually requires declaration but not always
- Does not apply to quasi-judicial or regulatory business

The Specific Exclusions

- As a member of an outside body, either appointed by the council or later approved by the council
- The position must be registered by you
- Not all outside bodies are covered and you should take advice if you are in any doubt.
- Allows participation, always requires declaration
- Does not apply to quasi-judicial or regulatory business

Categories of “other persons” for financial and non-financial interests of other people

- Spouse, a civil partner or a cohabitee
- Close relative, close friend or close associate
- Employer or a partner in a firm
- A body (or subsidiary or parent of a body) in which you are a remunerated member or director
- Someone from whom you have received a registrable gift or registrable hospitality
- Someone from whom you have received registrable election expenses

MINUTE of MEETING of the ASSET TRANSFER COMMITTEE held within COUNCIL CHAMBERS, WEST LOTHIAN CIVIC CENTRE, LIVINGSTON, on 16 DECEMBER 2019.

Present – Councillors Dom McGuire (Chair), Alison Adamson, Lawrence Fitzpatrick, David Tait

Apologies – Councillor David Dodds, Charles Kennedy, Dave King

1. DECLARATIONS OF INTEREST

There were no declarations of interest made.

2. MINUTE

The Committee confirmed the Minute of its meeting held on 2 April 2019 as a correct record. The Minute was thereafter signed by the Chair.

3. ASSET TRANSFER REQUEST BY WEST CALDER AND HARBURN COMMUNITY DEVELOPMENT TRUST

The Committee considered a report (copies of which had been circulated) advising of a community asset transfer request from West Calder and Harburn Community Development Trust (WCHCDT) and a request by WCHCDT for an extension to the statutory six-month deadline to determine the asset transfer request.

The report recommended that the Committee:

1. Note the receipt of a community asset transfer request from WCHCDT for the former West Calder Workspace buildings in Society Place, West Calder.
2. Note that WCHCDT had requested an extension to the statutory six-month deadline for the determination of that community asset transfer request.
3. Refuse WCHCDT's request to extend the statutory six-month deadline for the reasons set out in the report.
4. Refuse the community asset transfer request received from WCHCDT

The Committee was advised that prior to the meeting commencing officers had received additional information which indicated that there was a significant material change in circumstances to allow an extension of the statutory six-month deadline to determine the application. An extension of two-months was therefore requested.

The Committee agreed that the additional information could be tabled in order to allow it to make an informed decision on whether to grant the request for an extension of time to determine the application.

The Committee having considered the tabled document was of a mind to allow a two months extension to determine the application.

The applicant advised that he was seeking a six-months extension however consented to a two-months extension of time to determine the application.

Decision

In terms of the provision of Part 5 of the Community Empowerment (Scotland) Act 2015, the Committee agreed to extend the statutory six-month deadline to determine the application until 24 February 2020.



ASSET TRANSFER COMMITTEE

ASSET TRANSFER REQUEST BY WEST CALDER AND HARBURN COMMUNITY DEVELOPMENT TRUST

REPORT BY HEAD OF FINANCE AND PROPERTY SERVICES

A. PURPOSE OF REPORT

The purpose of this report is provide the Committee with an update on the community asset transfer request received from West Calder and Harburn Community Development Trust (WCHCDT) and to ask the Committee to determine that request on behalf of the council.

B. RECOMMENDATION

It is recommended that the Asset Transfer Committee:

1. Notes the update provided in this report in relation to the community asset transfer request received from WCHCDT for the former West Calder Workspace buildings in Society Place, West Calder.
2. Refuses the validated community asset transfer request received from WCHCDT for the reasons set out in this report.
3. Notes that since Committee met on 16 December 2019 WCHCDT has proposed changes to the validated application that was considered by the Committee, but that amendment and then consideration of an amended application is not legally competent.

C. SUMMARY OF IMPLICATIONS

I Council Values	Focusing on our customers' needs. Being honest, open and accountable. Making best use of our resources. Working in partnership.
II Policy and Legal (including Strategic Environmental Assessment, Equality Issues, Health or Risk Assessment)	Asset transfer requests are considered under the provisions of Part 5 of Community Empowerment (Scotland) Act 2015, its related guidance and by the council's approved Community Asset Transfer Policy.
III Implications for Scheme of Delegations to Officers	None.
IV Impact on performance and performance Indicators	None.
V Relevance to Single Outcome Agreement	We make the most efficient and effective use of resources by minimising our impact on the built environment.

VI Resources - (Financial, Staffing and Property)	The former West Calder Workspace buildings are currently vacant and subject to ongoing deterioration. The council is incurring significant holding costs and a decision on the future of this property is required.
VII Consideration at PDSP	Not applicable
VIII Other consultations	The local elected members for the ward have received a copy of this report for information.

D. TERMS OF THE REPORT

D.1 Asset Transfer Request Details

The asset transfer request details are as follows:

Applicant:	West Calder and Harburn Community Development Trust
Subject property:	Former West Calder Workspace buildings Society Place West Calder EH55 8SA
Ward:	Ward 6 – Fauldhouse and the Breich Valley
Local Members:	Councillor Pauline Clark Councillor David Dodds Councillor Cathy Muldoon
Lead officer:	Scott Hughes (Asset Manager) Direct dial: (01506) 281825 Email: scott.hughes@westlothian.gov.uk

D.2 Introduction

West Calder and Harburn Community Development Trust (WHCDT) have submitted a community asset transfer request to the council under the provisions of Part 5 of the Community Empowerment (Scotland) Act 2015 (the Act). A copy of that request is included at Appendix 1.

The Act requires that the council must approve that request unless, having regard to the statutory factors, the encouragement of equal opportunities and the observance of the equal opportunity requirements, there are reasonable grounds for refusing it.

Under the Act, the council has a statutory obligation to determine community asset transfer requests within six months of the request's validation date. In this instance that deadline fell on 18 December 2019.

The Act provides that the statutory six month deadline may be extended by agreement between the parties and at the Asset Transfer Committee meeting on 16 December 2019 the parties agreed to extend the deadline until 24 February 2020.

In order to remain compliant with the requirements of the Act, the council must either determine the asset transfer request by 24 February 2020 or, by agreement with WCHCDT, further extend the deadline for making that determination.

D.3 Background

The former West Calder Workspace buildings comprise a three-storey, brick-built former bakery dating from the early 1900's and a single story, stone-built former stable block dating from the late 1800's.

These buildings were latterly converted into a series of small office suites and business units that were let out by the council to local businesses as part of the Tenanted Non-Residential Property (TNRP) portfolio. The buildings are located on a site extending to 0.24 hectares, shown hatched in black on the plan at Appendix 2.

The units became redundant in 2013 following the council's acquisition of a former doctor's surgery building at Dickson Street in West Calder, which was redeveloped to create modern, fit-for-purpose TNRP business space. On 21 May 2013, Council Executive agreed that the former West Calder Workspace buildings at Society Place should be marketed for sale.

Council Executive at that meeting also noted an interest in the redundant buildings from WCHCDT, who had aspirations to redevelop these buildings and who sought to explore a potential acquisition from the council via community asset transfer. Council Executive agreed that WCHCDT should be allowed to develop their proposals and that this should run in parallel with the council's marketing of the property.

The vacant property was subsequently marketed for sale, however no viable commercial interests were received at that time. Officers continued to engage with WCHCDT and discuss their intentions.

On 29 August 2017, in the absence of either a commercial interest or an asset transfer request from WCHCDT, Council Executive authorised officers to make preparations for the buildings to be demolished and gave WCHCDT a maximum of twelve months to conclude any proposed asset transfer. At WCHCDT's request, that deadline was subsequently extended to 31 March 2019.

An incomplete community asset transfer request was received from WCHCDT on 5 April 2019. That request was subsequently validated by officers on 19 June 2019 following the receipt of additional supporting information from WCHCDT. The statutory deadline for determining that request was 18 December 2019.

On 22 November 2019, WCHCDT wrote to the council's Chief Executive requesting that the 18 December 2019 deadline be extended to 30 June 2020. The purpose of the proposed extension was to allow WCHCDT additional time to prepare a funding application to National Heritage and to submit a revised application to the Regeneration Capital Grant Fund.

The Asset Transfer Committee at its meeting on 16 December 2019 refused to grant the requested six month extension, however by mutual agreement at that meeting the parties agreed that the deadline would instead be extended to 24 February 2020. The purpose of agreeing that extension was to allow WCHCDT an opportunity to explore representations from a local business operator (SW Enviro Limited) who had, within a very short timescale prior to Committee meeting, expressed an interest in working in partnership with WCHCDT to jointly develop the former West Calder Workspace property.

D.4 Current Position

Having liaised with SW Enviro Limited, WCHCDT has sought to make significant changes to the validated proposal considered by Committee on 16 December 2019. The changes they have tried to make can be summarised as follows:

1. The former stable block would be sold off-market by the council to SW Enviro Limited. That sale would be at full market value and SW Enviro would seek to convert the building into office and training facilities for use in connection with their ventilation cleaning and servicing operations.
2. Ownership of the former bakery building would asset transfer to WCHCDT at nil cost and WCHCDT would seek to deliver a scaled-down version of their original project from that building.
3. SW Enviro Limited would enter into a legally binding contract with WCHCDT whereby the former bakery building would be sold at full market value by WCHCDT to SW Enviro Limited in the event of WCHCDT being unable to secure the external funding required to deliver their revised scheme within a defined period. The proceeds of that sale would be paid in full by WCHCDT to the council.

No new or revised documentation has been proved by WCHCDT in support of this new proposal.

The council's Chief Solicitor considers WCHCDT's amended proposal to be significantly and materially different to the original asset transfer request that was vetted and validated by officers on 19 June 2019. The Chief Solicitor's advice is that the Act does not provide for asset transfer requests being materially altered post-validation and that if WCHCDT wish an alternative proposal to be considered, then they should withdraw their original asset transfer request and submit a new request along with adequate supporting documentation (e.g. a revised business plan, funding proposals and evidence of community support for the alternative project).

WCHCDT have advised officers of their wish to proceed with an alternative proposal, but have not withdrawn their original asset transfer request. The Chief Solicitor has therefore confirmed that, in order to remain compliant with the requirements of the Act, the council must formally determine WCHCDT's original, validated asset transfer request by no later than 24 February 2020.

Even if it were lawful to make the proposed changes to the validated application, officers consider the proposed off-market sale of the stable block to SW Enviro to be at odds with the council's obligation to secure best value and contrary to approved disposal procedures, particularly in the knowledge that there are other commercial interests seeking to submit offers for the former West Calder Workspace property if and when the asset transfer process has reached a conclusion.

Similarly, the proposal that WCHCDT will enter into a legally binding contract to sell the former bakery building post-asset transfer to SW Enviro in the event of WCHCDT failing to secure project funding is considered by officers to be contrary to the spirit and intentions of the Community Empowerment (Scotland) Act 2015.

The Act provides that the council may continue with its marketing of the former West Calder Workspace property and explore third party interests in parallel with the ongoing asset transfer process. Given the particular circumstances of this case and in order to protect the council's position going forward, officers considered it prudent proceed in that manner. A closing date for offers to purchase the subjects has therefore been set for 12 noon on Wednesday 18 March 2020. Any open market sale of the property to a third party would be subject to conclusion of the asset transfer application process, including any statutory appeal process.

In order to protect the council's interests and to ensure that the council remains fully compliant with the requirements of the Act, it is recommended that the Committee determines WCHCDT's original, validated asset transfer request and does not consider their alternative proposal unless and until that proposal is formally submitted via a new asset transfer request in accordance with the council's approved Community Asset Transfer Policy.

D.5 WCHCDT's VALIDATED COMMUNITY ASSET TRANSFER REQUEST

D.5.1 Details of the proposal

WCHCDT's validated asset transfer request is that ownership of the former West Calder Workspace buildings and the associated 0.24 hectare site should transfer to them at nil cost.

WCHCDT would then seek to redevelop the buildings to create an events and wedding venue, a local heritage centre / museum, shop and café / bistro and a social hub for people with additional support needs. The anticipated cost of the project has been estimated by WCHCDT to be £4.20 million.

Full details of WCHCDT's proposals are provided in their Business and Development Plan included at Appendix 3.

Having undertaken a significant amount of preparatory work in advance of submitting their community asset transfer request, WCHCDT included additional supporting documentation as part of their submission. An itemised breakdown of that supporting documentation is provided at Appendix 4.

D.5.2 Representations

In accordance with statutory requirements, the receipt of this community asset transfer request has been advertised online and on site. The subject property is currently vacant and, as such, there are no building users or tenants to inform.

There have been no representations received in respect of this community asset transfer request.

D.5.3 Market Value

The market value of the former West Calder Workspace and its 0.24 hectare site has been assessed by the council's Corporate Estates Manager as being £100,000 (one hundred thousand pounds sterling).

D.5.4 Legal Implications

WCHCDT's community asset transfer request and their accompanying constitution were vetted by officers and confirmed as being valid in terms of Part 5 of the Community Empowerment (Scotland) Act 2015. Officers therefore issued a formal acknowledgment letter confirming the request's validation date as 19 June 2019.

A title check has yet to be carried out for this property and, as such, any decision to approve this community asset transfer request would be subject to the findings of a title conditions report undertaken by the council's Chief Solicitor.

D.5.5 Community Asset Transfer Officer Board Evaluation

In accordance with the council's approved Community Asset Transfer Policy, WCHCDT's asset transfer request was considered by the Community Asset Transfer Officer Board on 9 December 2019. The Board, comprising officers from a range of key service areas across the council, evaluated the request using a scorecard approach. A copy of the Board's completed scorecard is included at Appendix 5.

Section 82 of the Community Empowerment (Scotland) Act 2015 defines the criteria against which asset transfer requests must be evaluated and determined. The criteria are set out in detail at Appendix 6 of this report. The Board's evaluation of WCHCDT's asset transfer request was in accordance with that stated criteria.

The Board's findings can be summarised as follows:

WCHCDT is held in high regard by the Board and their strengths and capacities as an organisation are fully recognised. The Board also acknowledges the significant amount of preparatory work that WCHCDT have undertaken in advance of submitting this community asset transfer request.

Based upon the information provided, the Board do not believe that WCHCDT have adequately demonstrated a community-led demand for this ambitious project or that this is how the community of West Calder and Harburn would choose to spend a budget of £4.20 million given the choice. Both their Community Action Plan and Design Study consultation exercise point to the community identifying alternative priorities, including the provision of new recreational and sports facilities and improvements to Union Square and Main Street.

WCHCDT state in their submission that this is a "high risk project". The main area of concern for the Board is around deliverability and financial sustainability. WCHCDT have not secured any of the £4.20 million funding needed to deliver the project and were rejected by one of their anticipated major funders (the Regeneration Capital Grant Fund) at stage one of the funding application process in September 2019. WCHCDT have no meaningful commitment from their other proposed major funder (National Heritage) and appetite for their proposed community share issue is speculative. The Board also considered WCHCDT's revenue projections for future years to be lacking in detail and unsubstantiated.

It was noted that the project's assumed construction costs are likely to have risen given the passage of time and that these could rise further going forward, pushing the anticipated £4.20 million capital spend even higher. The Board considered that the project's contingency provision is inadequate given the project's "high risk" status and location immediately adjacent to a major, electrified, arterial railway line. Similarly, there is no reference to any detailed engagement with Network Rail's Asset Protection Team on the practicalities and risks involved in undertaking such a major redevelopment project in this sensitive location.

D.5.6 Alternative proposals for the asset

It is the responsibility of the Board to consider WCHCDT's asset transfer request in the context of possible alternative uses for the asset (including ongoing operational use or disposal on the open market where appropriate).

The former West Calder Workspace buildings are currently vacant and surplus to the council's requirements. They have been vacant since 2013 and are in a poor state of repair. The site has no specific designation in the Adopted West Lothian Local Development Plan 2018, however Planning colleagues have confirmed that a range of town centre uses, including residential development, would be supported in terms of future development potential.

Commercial interest in the property has been tempered by the significant costs that would be involved in either renovating the existing buildings or clearing the site and redeveloping it. Officers have however received two commercial offers from parties interested in acquiring and developing the site. Both those interests remain live.

It should be noted that no other community asset transfer requests have been received by the council in respect of this property.

E. CONCLUSION

The Board recommends that the community asset transfer request received from WCHCDT be refused on the following grounds:

1. WCHCDT have had in excess of six years to fully develop their proposals and to explore potential sources of funding. To date they have not secured any of the required £4.20 million needed to deliver their project.
2. The receipt of major funding from the Regeneration Capital Grant Fund is pivotal to the deliverability of this project. An application in June 2019 to that fund for £1.40 million was rejected at stage one of the application process.
3. The former West Calder Workspace buildings are in poor condition and they continue to deteriorate with the passage of time. The council continues to incur significant holding costs and officers are concerned that if these buildings continue to remain empty with their future unresolved, they will present a tangible risk to public health and safety. It should be noted that these buildings sit immediately adjacent to a major, electrified, arterial railway line. A neighbouring residential property has already been adversely affected by the increasingly poor condition of these buildings, resulting in disruption, inconvenience and cost to the public purse.

4. The council has received offers to purchase this property from two separate commercial operators, with other interests noted on file. Those interests present an opportunity to see the area redeveloped, which is one of the WCHCDT's stated aims. Further delays in addressing WCHCDT's interest would put alternative redevelopment options for this property at risk.
5. The Community Asset Transfer Officer Board has fully assessed the asset transfer request in accordance with the criteria set out in Section 82 of the Community Empowerment (Scotland) Act 2015. A scorecard approach was taken and the resulting score placed the asset transfer proposal in the "Weak" category.

Should the committee decide not to agree with this recommendation and instead accept WCHCDT's validated community asset transfer request, then the conditions set out in Appendix 7 of this report are considered necessary to safeguard the council's interests going forward.

F. BACKGROUND REFERENCES

Council Executive - 21 May 2013 – The Future of West Calder Workspace
Council Executive - 29 August 2017 – Update on Former West Calder Workspace
Community Asset Transfer Officer Board - 9 December 2019
Asset Transfer Committee - 16 December 2019 – WCHCDT Asset Transfer Request

Appendices/Attachments: Seven

Appendix 1 – WCHCDT's Community Asset Transfer Request

Appendix 2 – Location Plan

Appendix 3 - WCHCDT Business and Development Plan

Appendix 4 – Index of supporting documentation

Appendix 5 – Community Asset Transfer Officer Board Scorecard

Appendix 6 – Section 82 Criteria for determining asset transfer requests

Appendix 7 – Suggested conditions should Committee approve the request

Contact Person: Scott Hughes, Asset Manager, Finance and Property Services

Tel: (01506) 281825, E-mail: scott.hughes@westlothian.gov.uk

Donald Forrest, Head of Finance and Property Services

Date of meeting: 24 February 2020

Appendix 1: Community Asset Transfer Request

CAT Application

This is an asset transfer request made under Part 5 of the Community Empowerment (Scotland) Act 2015.

Section 1: Information about the community transfer body (CTB) making the request

1.1 Name of the CTB making the asset transfer request

West Calder & Harburn Community Development Trust

1.2 CTB address.

West Calder Community Education Centre, Dickson Street, West Calder, EH55 8DX

1.3 Contact details.

Matt Pearce, Trust Manager. Email: matt@westcalder.org Mobile: 07978 736 804

1.4 Type of organisation.

Company No: 446497
Scottish Charity: SCO43914

1.5 Has the organisation been individually designated as a community transfer body by the Scottish Ministers?

NO.

1.6 Does the organisation fall within a class of bodies which has been designated as community transfer bodies by the Scottish Ministers?

YES.

Section 2: Information about the land and rights requested

2.1 Please identify the land to which this asset transfer request relates.

The buildings and land of West Calder Workspace (as was) at Society Place, West Calder identified in red on the plan *appended as Document T*. Consisting of approximately 4860 square metres and forming part of the area identified in the Copy Deeds *appended as Document X*.

2.2 Please provide the UPRN (Unique Property Reference Number), if known.

N/A

Section 3: Type of request, payment and conditions

3.1 Please tick what type of request is being made:

for ownership (under section 79(2)(a)) - go to section 3A

3A – Request for ownership

What price are you prepared to pay for the land requested? :

Proposed price: £0

Section 4: Community Proposal

4.1 Please set out the reasons for making the request and how the land or building will be used.

West Calder & Harburn CDT are making this request in order to deliver their local community's project: Society Place - a multi- purpose heritage and community space. Our vision is for a high quality destination venue that provides services and facilities for the local community, attracts visitors from the wider area and plays a key role in the regeneration of the local area.

This is a large scale, community-led regeneration project based around the heritage assets of the West Calder area. *The Business and Development Plan appended as Document S* shows how the plan developed to its current stage through consultation and research and how WC&HCDT intend to deliver this project.

This is a multi-element project which is built around the heritage of the Cooperative Movement – of which West Calder is a key birthplace - local and national. The Co-operative Bakery Building - a Victorian designed, key local landmark overlooking the landscape of the Shale Oil mining industry (*see appended Document I for detail*) from which it grew will be fully refurbished to create a flexible and fully accessible space incorporating:

- event and wedding venue with catering operation
- a “hands-on” Cooperative museum, a local heritage centre and a hub for the Shale Trail
- a shop and café/bistro

- a hub for delivery of Additional Needs, ASD and community services in conjunction with West Calder Community Centre

More detail is available in Document S, Section 5 appended but we provide some additional narrative below.

Heritage and Museum

There is currently no permanent collection or display of the Cooperative Movement in Scotland. Consultations have also placed sharing and celebrating our heritage high on the community's agenda and there is strong desire for a permanent local heritage centre.

We plan a destination that provides a hands-on, multi-media, multi - generational and multi - ability "experiential" museum that is intrinsically interwoven with local social, built and industrial history. We will show how local history interacts and influences national history while providing space to bring together a collection of national importance in one site.

We want this to be more than a "traditional museum". This will be a space where people can see, touch, feel, hear (and try on in the case of clothes!) things that bring back memories and relationships and engenders new understanding. In all groups we want to inspire people with knowledge that people have, do and can pull together to achieve common goals in the face of social and economic adversity.

This will have a strong "non-traditional" and ASN/ASD accessible theme: a hands-on, interactive (physical and digital) experience celebrating both local and national heritage and the links between these. West Calder has played a key role in the development of the cooperative movement and the heritage space will include a Scottish Gallery/Museum of Cooperation, bringing together a collection of national importance in one place for the first time. We are working with the support of the Cooperative Heritage Trust, Cooperative Education Trust, The Cultural Cooperative and The Peoples History Museum on this.

The legacy and heritage of the Cooperative Movement (in the form of Cooperative Societies, Social and Community Enterprise and Community Empowerment) is as relevant and important now as it ever has been.

Retail and gallery space will be linked to the heritage space providing an opportunity to promote local crafts and produce.

The Shale Trail Southern Hub, an orientation and display space for this newly funded project will also be housed as part of the heritage offering creating links between the cooperative and shale oil industries and between Society Place and its heritage partner Almond Valley Heritage Trust.

Society Hub: Community and Special Support Needs Spaces

The Society Hub – purpose designed space for those with additional support needs and their families. We are working in partnership with a local support charity to develop this, potentially providing them with a base and enabling them to offer training, services and meeting space for the families they support. Signpost, New Directions and the ASD resource at St Mary's Primary School are supporting us on integrating accessibility into the heart of this project.

Community Group and Education Space (including flexible use of the exhibition spaces) – this will complement and augment those in West Calder Community Centre ensuring best use of space across the two buildings. We are currently working in partnership with West Calder Community Education Centre on a number of projects (including the Community Café) and with them and Polbeth Hub on a joined up approach to community facilities and increasing community control of those.

Unitas Hall Wedding and Event Hire Venue

The Unitas Hall events and wedding venue will both provide a service locally, generate income and provide employment and training opportunities. We have a wide range of experience “in-house” in events, wedding and catering and are working with the Events course providers at West Lothian College

Catering kitchen will service the wedding and events business and the café/bistro and offer real-world work experience and training opportunities through links with West Lothian College and other local social enterprises.

Café/bistro attached to catering and training kitchen and linked to the gallery/retail space

It is the interaction between the above elements, encouraged by their physical proximity to each other, that will allow this project to deliver the USP of being a destination genuinely for ALL the family, whatever form your family takes.

This project has been developed by the community, facilitated and supported by WC&HCDT. The idea for the project was first established in the 2013 Community Action Plan of West Calder & Harburn (CAP) *appended as Document A* and urban realm study in 2014 *appended as Document C*.

In these studies the local community identified the following goals and actions:

- To celebrate local history and heritage
- To provide more quality community spaces
- To provide a family friendly venue with eatery
- To provide facilities for those currently excluded
- To revitalise the local trade economy
- To create jobs and opportunities for younger people
- To provide social facilities and services for excluded, vulnerable and older people
- To grow a sense of community pride
- To have community owned, income generation opportunities to help provide services long-term

Further consultation, feasibility and design work took place in 2017 to explore in more detail how the community wanted to use the space at Society Place. This included a community survey, stakeholder conversations, public meetings and focus groups. Throughout this development process we have worked in close partnership with a number of organisations including West Calder

Community Centre and Polbeth Village Hall (now Polbeth Hub) to ensure plans are developed in the context of other developments within the area.

Much detail on the development and testing of this project are contained in the Appendices. A Matrix detailing these appendices with date, author and a description of each is with this document.

Detail on community consultation, research and consultation are available in appended Documents O & P.

Detail on development of the proposed project and physical plans for the building are contained in the appended development plan and design reports, Documents Q & S).

Where we are and Next Steps are covered in appended Document S.

Design development detail is available in appended Document Q.

Benefits of the proposal

4.2 Please set out the benefits that you consider will arise if the request is agreed to.

Our Strategic Alignment Document (appended as Documents V) shows how this project fits with both local and national strategies, aims and outcomes.

Document S, Sections 3 & 5 gives detail on the local population and social outcomes.

Strategic outcomes are identified in Document S, Section 5.

West Calder and Harburn CDT's aims are in their simplest terms "to make life better for the inhabitants of the area". We take an asset- based approach to our work building on existing strengths within the community. Through this project we will utilise a range of local assets - a rich heritage with local and national relevance; a high level of community support, capability and desire; a strong sense of identity; a partnership of strong local community organisations; a key landmark building – to deliver a wide range of economic, physical and social benefits locally and across the wider West Lothian area.

Area of benefit

The facility is within the Fauldhouse and Breich Valley ward, home to three of West Lothian's most deprived areas (Central West Calder and Mossend itself has one of the lowest median incomes in the county) The facility will however also act as a focal point for regeneration throughout the wider South and West area of West Lothian. As a key community anchor organisation, West Calder and Harburn CDT is experienced in catalysing, organising and funding regeneration strategies in both the Fauldhouse and Breich Valley and further afield (Blackburn, Whitburn, Armadale and Knightsridge) through the Aspiring West Lothian project. The Society Place project will allow us to build on this work, facilitating and supporting initiatives within local communities. This will be possible because the project, although led by West Calder and Harburn CDT, meaningfully involves a number of other local community groups who have already evidenced partnership working through the Five Sisters

Community Partnership. These include Polbeth Hub, West Calder Community Education Centre, Polbeth and West Calder Community Garden and Harburn Village Hall Association.

The shared nature of the heritage focussed on in this project provides a platform to unite this work across many communities in West Lothian particularly those geographical communities with high levels of deprivation as these are the very communities from where the cooperative movement grew and was so integral to life. This is a similar approach to the education and social welfare outreach undertaken by The Cooperative Heritage Trust and The Rochdale Pioneers Museum in Rochdale and Manchester

We have summarised the wide benefits of this initiative below and provided an analysis of how these align with local and national priorities and strategies. In particular, the West Lothian Council priorities from the West Lothian Regeneration Framework, Local Outcomes Improvement Plan, the Transforming Your Council Corporate Plan and the West Lothian Anti-Poverty Strategy; and National priorities from the Scottish Governments Achieving a Sustainable Future – Regeneration Strategy. This alignment is further summarised in the appended Strategic Alignment document.

Economic benefits

This project will offer a range of economic benefits. The building will include commercial and community use, generating income and creating jobs, training and volunteering opportunities. These will include jobs to run the facility and services and businesses within it, placement and training opportunities within the catering kitchen and volunteering opportunities within the heritage spaces, retail and gallery area. The use of the facility by community groups also has the potential to expand local provision of volunteering opportunities.

It will also attract visitors to the area, increasing trade to the local economy and providing an outlet for local craftspeople and artists to showcase and sell their wares. It will also help raise the overall profile of West Lothian as the home of a “national” collection and display.

The project aligns strongly with council priorities, the West Lothian Framework for Regeneration and the local outcomes improvement plan which all include a focus on employment, education & training and economic development.

Social benefits

We expect the project to deliver significant social benefits across a range of areas including health and wellbeing, anti-poverty and improved community cohesion.

- **Health and wellbeing**

Both WC&HCDT and their partners West Calder Community Education Association have the wellbeing of the local population written into their constitutions.

Firstly, WC&HCDT has been trialling and developing a system of “social prescription” which aims to make the most of social opportunity and activity to help alleviate physical and mental health issues and the consequent reliance on medical services and drug prescription. We are working with West Calder Medical Practice in this as well as with other community partners through The Five Sisters Community Partnership. Key to this process is volunteering and we have found that heritage is a

good “hook” to engage people locally. In particular, primary school children (including those from the ASD Resource at St Mary’s Primary in Polbeth) and older and more isolated members of society. We intend to build volunteering and its positive effect on mental health and wellbeing into this initiative in a fundamental way. Indeed volunteering will be a key element of the sustainability of the community and heritage elements of this project.

Our Good Connections Handbook which shows our procedures for volunteers and health and well-being provision and which will provide the model for Society Place is appended as Document Y.

Secondly, access to facilities for physical activity (Youth Clubs, Play Groups, Martial Arts, exercise groups) is a key role of the existing Community Centre but the facilities have to “double-up” for social and educational requirements and ensuring their long-term sustainability is a challenge. This project has the capacity, by developing additional community spaces, to allow existing facilities to focus on better and more appropriate provision. WC&HCDT is working closely in partnership with West Calder Community Education Association to achieve this. The financial sustainability of this project (and the community owned enterprise within) is also, as a joined up community initiative, about the long-term sustainability of all of these facilities and services.

Thirdly, the entire venue and building will be designed to be genuinely accessible to all. As we say in our mock-up leaflet “When we say family-friendly, we mean ALL the family! “ All spaces, access and the services will be built to cater for all. The lower floor itself will house The Society Hub, an area that expands the educational and inspirational aspects of the museums and heritage centres into spaces that are able to cater for groups that work with individuals who need specialist support. This will include quiet and sensory areas, full adult changing facilities, accessible learning spaces and a sensory garden. There will also be opportunity to work with specific groups such as dementia support groups. We have learned in our research that communities of people with or supporting people with ASN or ASD often feel excluded from the social, educational and activity opportunities that mainstream communities might be able to access. It is these opportunities that do so much to engender support and a sense of well-being that we wish to provide.

- **Community cohesion and identity**

The health aspects outlined above are more specific to individual wellbeing but social wellbeing is again at the core of what WC&HCDT and its local partners strive for. The community has, in its Community Action Plan and in subsequent consultations, expressly stated its desire for more community events, more community facilities and spaces, more family-friendly eating opportunities, and space to celebrate local heritage. This project aims to deliver aspects of all of these. But perhaps less tangible, yet equally as important, is the desire to feel and express pride in the community, The Village and the area. To celebrate the “unique rural identity” and to encourage others to visit and respect this. The project also provides opportunities for increased and improved connections within the community by providing space for groups and individuals to come together.

Health and wellbeing feature strongly across council priorities, the regeneration framework and local outcomes improvement plans and both the regeneration framework and LOIP have outcomes relating to improved community cohesion and resilience.

- **Anti-poverty**

On the face of it, it may not appear as though this project is part of an anti-poverty strategy but it is in a number of ways. WC&HCDT has been actively involved with development of the Community Planning Partnership and in the first steps of implementation of the West Lothian Anti-Poverty Strategy. It has also developed a local anti-poverty strategy with Polbeth Hub and is instrumental in delivering projects that tackle issues such as access to support services (financial and health and wellbeing), quality affordable food (through a community shop and community café), facilitating a job club and working with The Advice Shop. We believe that along with access to support services (helping the “pockets” and “place” aspects of the Anti-Poverty strategy aims) it is the Prospects and People aspects that this project can really help deliver on.

We are building this around the aim of offering employment, training and volunteer opportunities to local people. We are working with West Lothian College and West Calder High School to ensure that what we offer fits the requirements of their local students and curriculum. We already host many students and volunteers in our projects and what we have learned is that there is a lack of “real world” work experience opportunities where students (young and old) can gather and test the skills required in a place that offers support and understanding. This is particularly important for those on the margins of opportunity.

Because this is a community led and developed initiative and we have taken great inspiration from the work carried out by the Rochdale Pioneers Museum, we intend that local touring events and community events in house will form a major part of what we do. The heritage we are working with is about local people and communities and we aim that this continues to be run and developed by as representative group as possible. We want that people feel actively involved in their community and that they can influence and effect change in their area.

Physical benefits

The project will bring a derelict building back into effective use, providing a high quality facility and instilling a sense of pride in the local community. The Cooperative Bakery Building is an important local landmark and The Society has played a huge part in the history of the village – as a place of employment for many families throughout the generations and serves as a link to the cooperative movement at both a local and national level. The building has many unique architectural features which will be made use of including three large windows overlooking the “Five Sisters” which will be within the Uitas Hall which will be used for wedding and event hire. The plans for the building and the use of space within it will ensure the facility is fully accessible for all with a particular focus on those with ASD (Autism Spectrum Disorder) and additional support needs and their families. It will also include a “changing places” toilet. The building will also provide a permanent home for a collection of the cooperative movement in Scotland for the first time and a “hands-on” experience of what “cooperation” means in today’s world.

This aligns with council priority of ‘protecting the built and natural environment’ and the local outcomes improvement plan which recognises the importance of the historic and built environment and includes a commitment to promote culture and heritage services.

The design drawings and visualisations are available in appended Document Q.

Restrictions on use of the land

4.3 If there are any restrictions on the use or development of the land, please explain how your project will comply with these.

Scheduled Items (doorway)

There is one historical, scheduled doorway carving on the building. This must be preserved either in-situ or elsewhere. The project aims to leave the doorway carving in place and views it as a heritage asset

Planning restrictions

Our investigations so far have identified several potential planning challenges. These include change of use, parking, vehicular access and noise levels.

At this stage, we believe that through conversation and discussion with the planning authorities these issues can be identified in more detail and resolved. We do however acknowledge the importance of conducting this conversation at the earliest possible opportunity and have engaged our architects to commence this immediately.

Electrical Sub-station

The sub-station is a challenge but not a major risk. We do not yet have a clear cost for relocation of the sub-station (which would be the preferred option) but accept that it could be as much as £500,000. Our design team are fully aware that at this cost relocation may well not be viable. In this instance we have alternative options regarding layout.

We are in discussion with Scottish Power to clarify the position but this should not be seen as a deal breaker.

Proximity of railway

- The building is very close to the Edinburgh to Glasgow (Shotts) line. This will have an impact on the nature and method of works to the northern façade. This will be a challenge but no more, indeed possibly less, than for demolition of the building.

We have discussed this with Network Rail Asset Protection Department and have an agreement to work with them as plans develop.

Negative consequences

4.4 What negative consequences (if any) may occur if your request is agreed to?

How would you propose to minimise these?

Please refer to the Risk Register Document S, Section 7 and Funding Strategy Timeline, Document W.

Any Asset Transfer Request should be conditional on achieving a level of funding such that the project is viable. We know from other asset transfer projects that funding requirements change and that this can occur after transfer of an asset. This means that there is always an element of risk to the CTB both financial and reputational. In order to minimise this we have instructed our design team to develop as robust as possible funding and phasing plan taking into account potential for value engineering, procurement approach and to consider minimal development levels for financial viability/sustainability.

Capacity to deliver

4.5 Please show how your organisation will be able to manage the project and achieve your objectives.

West Calder and Harburn Community Development Trust is a robust and capable organisation with a strong track record in delivery including:

- Village Improvement Fund projects totalling £75,000
- Aspiring West Lothian (£250,000)
- Five Sisters Skatepark (£150,000)
- Brunch Club Community café
- Several heritage projects including pop-up museums and exhibitions
- Annual Fireworks (2500 people) and Christmas events

WC&HCDT are also working with both Collective Architecture Ltd and Community Enterprise Ltd who have, individually and between them, a vast experience in funding, designing and delivering large scale and complex projects such as this.

Our design team led by Collective Architecture Ltd have a huge range of experience and expertise in delivering large and complex physical projects. Their initial tender document which highlights some of their case studies and team experience is *appended as Document Z*.

Our development consultants, Community Enterprise Ltd, bring great experience in developing sustainable, community led and enterprising projects and in engaging and working with local communities. Their initial tender document which highlights experience and case studies is *appended as Document AA*.

We have a strong board with a good mix of skills and a dedicated staff team. Nevertheless we recognise the size and challenge of this ambitious project. Potential management structures are considered at part of the appended Development Plan and Feasibility Study. These structures may well evolve with the detailed design of the project but upskilling and capacity building of the staff and trustees is ongoing and will form a large part of the next development phase. As a development trust we have access to a range of support through DTAS to help with this.

Our current board consists of:

Gavin Henderson (Chair): Gavin is a Senior Civil Servant with The Scottish Government working at a ministerial level. He is also an ex-trustee of Citadel, a long standing youth charity in Leith. Gavin lives

in West Calder with his young family and brings a high level of managerial, funding and strategic management experience to the team.

Steph Gibbs (Treasurer): Steph is an Actuary and works in Edinburgh. She brings a wealth of financial and risk management experience to our team. Steph also lives in West Calder with her young family.

Alan Bryce: Alan is a local businessman who grew up in and currently lives in West Calder. He and his wife are foster carers for several children. Alan has a great local understanding of the community and economy and knowledge of issues being faced by the younger generation.

Carolyn Craig: Carolyn is Chief Executive of New Directions, a Livingston based third-sector organisation that works with people with ASN. Carolyn lives in West Calder and brings great strategic understanding of the Third Sector, specialist knowledge in supporting those with additional needs and managerial experience.

Kate Sneddon: Kate is a social worker who works in West Lothian and lives in West Calder with her young family. Kates understanding of the issues facing people in areas of deprivation and practical solutions to those is an invaluable resource.

Iain Gillespie: Iain is a financial advisor and also Chair of Harburn Village Hall Association. Iain brings both financial experience and helps ensure The Trust has a good partnership with organisations in our rural areas. He lives in Harburn with his young family.

Craig Meek: Craig works as a housing support officer and manager of a local sheltered housing complex. He is also Chair of West Calder Community Education Association and as a key local volunteer brings a wide knowledge and experience of local issues and opportunities. He lives in West Calder with his young family.

Joan O'Donnell: Joan is a manager of a local sheltered housing unit and is Secretary of West Calder Community Education Association as well as of West Calder and Harburn Community Council. She lives in West Calder and brings huge experience in the administration of organisations particularly in times of change.

Jock Kerr: Jock is an experienced youth worker with West Lothian Council and is a long standing trustee of West Calder Community Education Association. Jock brings a keen understanding of the requirements of our younger community and coordinating with council services. He lives in West Calder.

Frank Boles: Frank is retired Headteacher of St Mary's Primary School in Polbeth with a long career in education in West Lothian. Frank also brings a wealth of community knowledge and has been involved in community activities for a long time. He also lives in West Calder

To date we have visited other similar projects to learn from their experience.

These include:

- Rochdale Pioneers Museum
- The Peoples History Museum
- The Grassmarket Project

- The Lighthouse
- Beith Community Trust
- Twecher Community Trust
- Cat Strand Community Arts Centre
- Manchester Museum of Science and Industry
- Summerlee
- National Coalmining museum
- Barra Community Development Trust
- Bhu Barra Community Shop
- Vatersay Community Hall
- New Lanark
- Community Central Hall
- Maryhill Burgh Halls

Learning from many of these projects informs and is referred to at various stages of the development process so far (documented in the appendices) and is currently being collated into a matrix which identifies key lessons, advice and inspiration.

We are aware of the ambitious nature of this project and where our experience is limited. We believe that strong partnerships are key to being able to deliver this. Our partners (at differing levels of engagement and development) include:

Community

- Five Sisters Community Partnership – in fitting into a joined-up goal for the wider community
- West Calder Community Education Association – in delivering better community services and facilities including meeting rooms, activity spaces, catering and events
- Harburn Village Hall Association – to offer a coherent range of community facilities
- Polbeth and West Calder Community Garden – to offer a coherent range of community facilities and access to sustainable food

Heritage

- Cooperative Heritage Trust (Rochdale Pioneers Museum) – to share displays, exhibitions and support on design and presentation/interpretation
- West Lothian Council Museums Department – for artefacts and support on methodology and presentation/interpretation
- West Lothian Council Archives – in providing access and materials and offering a “supervised access” facility and technical advice
- Cooperative Education Trust – in offering access to educational materials and support on presenting modern day information on cooperatives
- The Cultural Cooperative – for support on presenting information on the social, literary, musical and wider cultural impact of the cooperative movement
- The Shale Museum (Almond Valley) – sharing artefacts and information and expertise on the local cooperative movement and its relationship to the shale oil and mining industry

- The Shale Trail - supporting the development of this project and providing a southern hub
- Heritage Lottery Fund – our HLF supported heritage mapping project is where the collection started and roots it in the local community, it also provides the foundation for the interactive element of our offer

Events and Catering

- West Lothian College – we provide work placements for events and catering students who have a high end reputation and wish to be involved from the outset
- West Calder Community Education Association – we partner on our community café and heritage events
- The Larder – we are in continuous discussion about integrating what they do locally with our offering
- West Lothian Council Community Arts – technical support and advice on exhibitions, spaces and working with artists

ASN and ASD

- St Mary's Primary ASD resource – we have offered hand-on sessions with pupils and they feed into design of space and service
- Signpost – in supporting design of all elements of the project and exploring the potential for being a “resident partner”
- New Directions – offering support and advice on ASN services and design

A critical part of the next stage of development will be developing formal partnership agreements with a number of these partners. Key ones will be:

- Signpost
- The Cooperative Heritage Trust
- West Lothian College

Section 5: Level and nature of support

5.1 Please provide details of the level and nature of support for the request, from your community and, if relevant, from others.

This project has been developed from the ground upwards through the 2013 – 2018 Community Action Plan and the 2014 Urban Realm Design Study. *Appended as Documents A and C.*

The project specific engagement and consultation detailed in the appended Feasibility Study shows that 83% of the community support this initiative. This survey included those from neighbouring communities and wider across West Lothian.

Full details of the consultation, survey and feasibility process are given in appended Document O.

As outlined above, we have support from various organisations and individuals in developing this project.

Further work to develop partnerships will take place during the development phase.

We also have a commitment of support from our local elected members (MSPs and Local Councillors).

Section 6: Funding

6.1 Please outline how you propose to fund the price or rent you are prepared to pay for the land, and your proposed use of the land.

At the level of our full ambition this is a costly project. It is also an opportunity to leverage funding into the county.

Detailed costings for the project design at this stage are contained in appended Document R and referred to in Document Q.

Our funding strategy is detailed in Document S and summarised in Document W.

We would like very much to work with West Lothian Council on securing funding from the Scottish Government Regeneration Capital Grant Fund as we believe the project aligns strongly with the council's priorities and regeneration framework. We plan to put a proposal to Council Executive in May 2019.

In addition to this we have a current EOI live with the National Lottery Heritage Fund with whom we have been in discussion about this project for nearly two years. LHF is likely to be the driving funder for this. We are also in discussion with National Lottery Community Fund for their Community Assets fund for the ASN, ASD, community and education areas.

The Trust is also receiving support and advice from Community Shares Scotland about raising capital not just from the local community (the buy-in would be very positive but the figures not very large) but with the wider national (and international) community of organisations in the cooperative and social enterprise sector.

There are a number of smaller funding streams we have identified that would individually fund certain elements of this project and collectively amount to a sizable contribution.

Finally we are in discussion with a number of social investment organisations from whom we may be able to borrow for the social enterprise/business element of this project.

The attached development plan includes further detail on potential funders for capital and revenue costs.

The ongoing financial sustainability of this project and its viability is discussed in appended Document S and a cashflow forecast is provided as appended Document U.

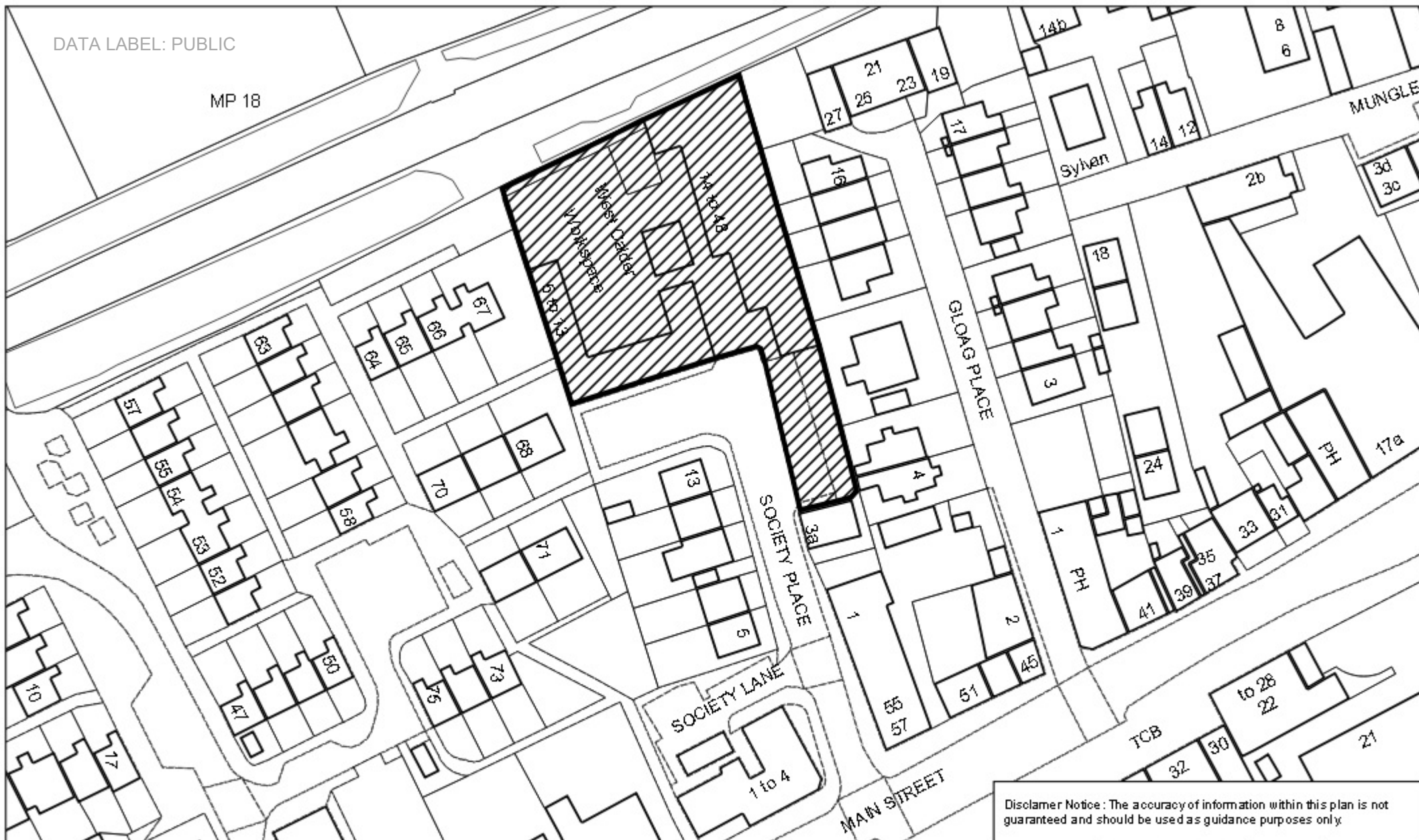
Development of the Business Plan


Section 7: Other supporting documentation

To enable the council to fully consider your application, the following supporting documentation must be submitted as part of your application:

An Appendix Matrix with detail on all supporting documents is provided with this document and includes the following:

- A copy of your organisation's constitution
- A business plan (that is proportionate to the nature of the asset transfer request)
- Audited accounts (or a financial projection where the applicant has been operating for less than one year)
- Annual reports (where these are available)



	<h2>Appendix 2 - Former West Calder Workspace</h2> <p>Property Management, West Lothian Civic Centre, Livingston, EH54 6FF</p>	<p>N.T.S</p>	<p>A4</p>	<p>N ↑</p>
		<p>10/12/2019</p>	<p>Reproduced from the Ordnance Survey mapping with the permission of Her Majesty's Stationery Office. Unauthorised reproduction infringes Crown copyright and may lead to prosecution or civil proceedings. © Crown copyright. All rights reserved. Licence 100037194 2019</p>	

Appendix 3: Business and Development Plan

Society Place Destination West Calder

Business and Development Plan
West Calder & Harburn Development Trust

v. April 2019



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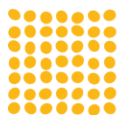


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1. Background and Context

This Business and Development Plan sets out the plan to deliver a large scale, community-led regeneration project based around the heritage assets of the West Calder area. It shows how the plan developed to its current stage through consultation and research and how WC&HCDT intend to deliver this project.

This plan is also summarised in our Executive Summary available as a separate document.

1.1 The Project

The villages of West Calder and Harburn lie south of Livingston in West Lothian. A Community Action Plan completed in 2013 recommended creating a development trust to help regenerate the local area. The West Calder and Harburn Community Development Trust (WC&HCDT) was founded in 2013, and has since run a range of successful projects working with local people.

The 2013 Community Action Plan identified 5 Themes and a number of Priorities and Actions, including making West Calder a ‘destination’ – attracting families and visitors from across the local area to boost the local economy, and create opportunities and develop something local people can be proud of. A 2014 Urban Realm study also identified developing the Society Place building as a priority development for the village.

There is considerable momentum to find a sustainable future for Society Place, tying into this idea of creating a ‘destination’.

In the Autumn of 2017, WC&HCDT commissioned Community Enterprise to undertake a feasibility study and options appraisal for the site. The Trust had already gathered from the community a sense of what the building could become and were keen to test those initial assumptions which included: Wedding /Events Venue; Bistro/Restaurant; Micro Brewery/Distillery and Tap Shop; Heritage Space and Gift Shop/Retail space.

Following this research and consultation the, project plan has developed into an offering that is ambitious, viable and meets many of the needs identified by the community while supporting other community initiatives and a wider programme of regeneration.

Society Place will be developed into a community owned facility and commercial venture offering:

- event and wedding venue with catering operation
- a “hands-on” Cooperative museum, a local heritage centre and a hub for the Shale Trail
- a shop and café/bistro
- a hub for delivery of Additional Needs, ASD and community services in conjunction with West Calder Community Centre

Designed throughout this will be the themes of accessibility and opportunity. This means making the entire venue and its activities open to all who may be excluded (ASD, Additional Support Needs, Learning Disabilities and age and poverty related issues) and providing opportunities for those groups to engage with their history and heritage, access training and job placements, meet as communities, volunteer meaningfully and access employment.

This Business and Development Plan sets out how we will approach the project, provides information about the different income streams and community projects, our social outcomes, and how it will be managed. This is the first step of our business planning process and will inform development of full detailed Business Plans for each element during the development phase.



1.2 The Development Trust

The West Calder & Harburn Development Trust was incorporated in 2013 to help deliver

“a thriving family-friendly, lively and enterprising community with its own unique rural identity”

There are (as of April 2019) 10 directors and 7 members of staff. The Trust has 96 members and operates projects that benefit residents of West Calder and Harburn including an Interactive Heritage Mapping Project, managing the Harburnhead Windfarm Community Fund, working on local rights of way, improving our “gateways” into West Calder, public arts projects, intergenerational projects, recruiting volunteers and helping to promote what’s going on in and around West Calder and Harburn.

A large project for 2018 has been researching the feasibility of developing the old Bakery in West Calder, which is now complete and informs this Business and Development Plan.

Projects in West Calder

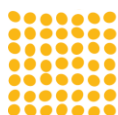
The Trust (alone and in partnership) has a number of new projects taking place in West Calder and Harburn which will set the context for the Society Place project as well as enabling us to tell our residents what’s going on with Society Place.

These include:

- Funding secured (£150,000) to build a Skatepark near the new West Calder High School (attracting young people from the local area)
- New village gateway signage to emphasise our local identity
- A new piece of public art by the new West Calder High School
- Regular successful events (Fireworks and Christmas Fayre)
- Ongoing artists street work around West Calder recognising the importance of shale mining in our community; our public phone box has recently been painted with a canary
- A Pop up cinemas that was trialled in West Calder
- A commemorative event with pop-up museum for the 70th anniversary of the Burngrange Mining Disaster in 2017
- A Heritage Festival and second pop-up museum was held in April 2018 which attracted over 500 visitors (held at the Council Information Offices in the centre of town).
- A heritage photographic exhibition and third pop-up museum in April 2019

1.3 The Building

The concept of the development of Society Place in West Calder originated as part of the consultation for the Community Action Plan in 2012. This identified that the community favoured “A big new project to underpin the revival of the community – Destination West Calder” and suggested we draw up a brief for an Urban Realm Study; approach a range of consultants and develop imaginative ideas and options for the use of our public buildings and outside spaces”



The Design Study of 2014 looked at the potential of developing The Workspace Building (as The Old Coop Bakery on Society Place was known) along with other physical projects in the area.

Located on Society Place off Main Street, West Calder, the main Old Coop Bakery Building was originally opened in the early 1900's (although The Stables block is older). More detail on the building, its history, morphology and setting, is included in the architects reports by Collective Architecture 2018 & 2019. Whilst the community would ideally like to see the whole site developed, we have decided to approach this as 2 phases, with phase 1 being to focus on the main bakery building initially. How The Stables block will be approached latterly will be considered during the detailed development stage.

Society Place Main Bakery Building comprises a basement (240 sqm), ground floor (659 sqm), first floor (389 sqm) and first floor mezzanine (114 sqm). Society Place is in a poor state of repair but still has architectural historic features remaining intact. It does need refurbishment and improvements to the roof and structure to the building. In September 2017 estimated structural repair costs were as follows (additional costs are also expected) and this figure does not include internal refurbishment:

- Society Place £423,997 plus VAT
- Removal of the Sub-station at £80,000 plus VAT

History of Society Place and West Calder Cooperative Society

The West Calder Co-operative Society was founded in 1875 by a group of forty Shale Miners who each invested their own money. They desired to improve their social and moral condition and wished to spend their hard earned wages in shops that were controlled and managed by themselves rather than buying goods from their employer's shops at inflated prices.

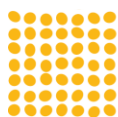
The West Calder Co-operative Society (WCCS) commenced trading in June 1875 and had £5.00 Capital to purchase stock. Despite this limited budget, it thrived. Larger premises were opened in 1877 and purpose built premises were erected in 1890. These premises held their own power station and this was used in 1893 to enable West Calder to become the first village in the UK with electric street lighting. The large WCCS building still standing on Main Street opened in 1914. The WCCS had branches throughout the district, from the Forth to Blackburn and Uphall to Stoneyburn. WCCS had interests in coal, gun powder and its own works department which held the maintenance contract for Bangour Hospital amongst other enterprises.

It was the cradle of the co-operative movement in the western district of Mid Lothian and its ambitions stretched beyond commerce. The Society built homes for its employees and offered loans to members to build their own properties. Its pioneering Education Committee awarded prizes to the best scholars and evening class students and it provided classes in dress making and first aid for the local community.

The Bakery Building was designed in the 1880's but not completed until 1909. Its basement now housed the electrical power station that had been in the Central Building.

Although the bakery in Society Place closed in 1982 when WCCS merged with Bathgate Cooperative Society, the WCCS model was taken over to Donegal by Paddy Gallagher who had worked in the local shale mines. He established the Cope officially known as Templecrone Agricultural Co-operative Society in Donegal in 1906 which is still trading today with branches throughout West Donegal.

The Bakery Building and Stables block together became the home of West Calder Workspace until it closed entirely in 2013.



1.4 Asset Transfer Process

West Lothian Council have been incredibly supportive of the asset transfer process. The Council has a procedure in place to put applications for asset transfers through the expression of interest phase and then the formal approval phase. We will submit our formal application to start the asset transfer process in April 2019, gaining formal approval by October 2019.

The process and timelines we will follow are:

Milestone	Who is responsible?	When?
Get valuation confirmed on site	West Lothian Council	To be agreed with WLC
Complete Business Case and Development Plan	WC&HCDT	April 2019
Submit CAT application to West Lothian Council	WC&HCDT	March 2019
Agreement of asset transfer	West Lothian Council	October 2019
Transfer of title	West Lothian Council	TBC

1.5 Plans for the building

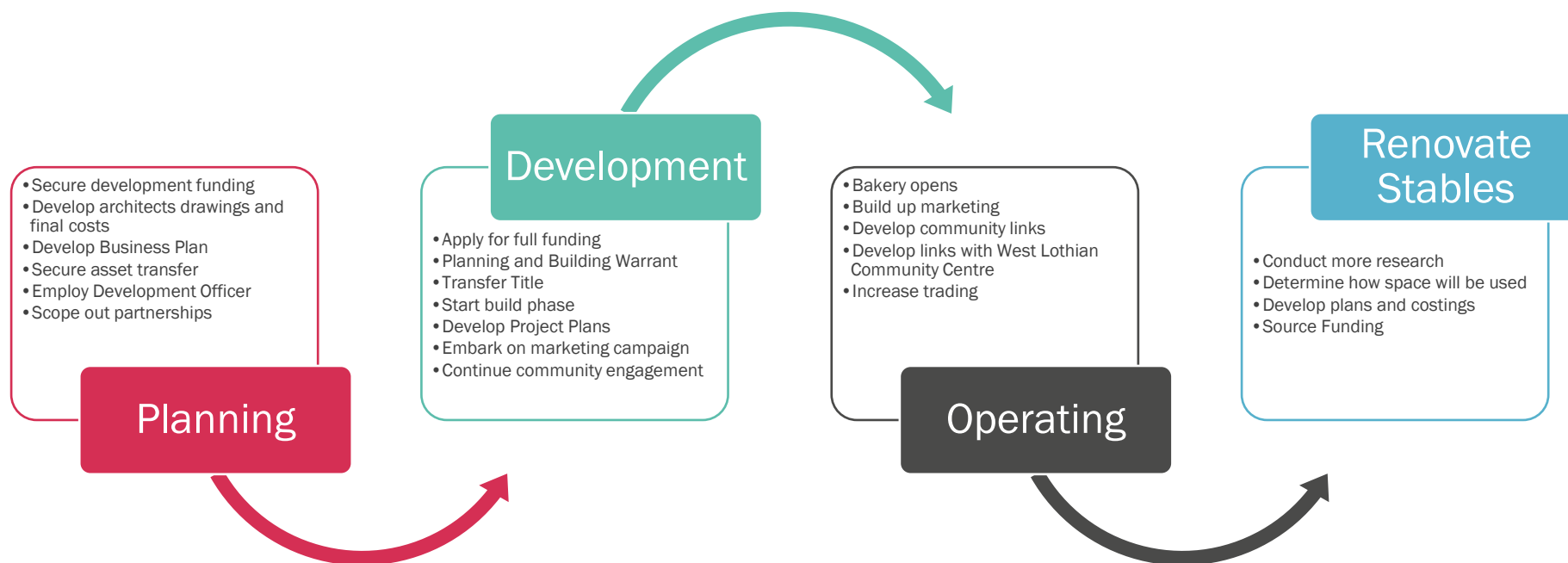
Focusing on the old Bakery building, concept designs and floorplans are shown in Appendix 1; these will be further developed to RIBA Stage 3 during the Development Phase. More detail on the design development process is available in Collective Architecture's Design Development Report of March 2019.



2. Project Plan

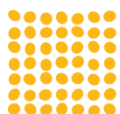
2.1 Phasing – How we will approach the project

The Trust is approaching this project in a number of phases as this is a large capital project and we expect that phasing will facilitate good project management:



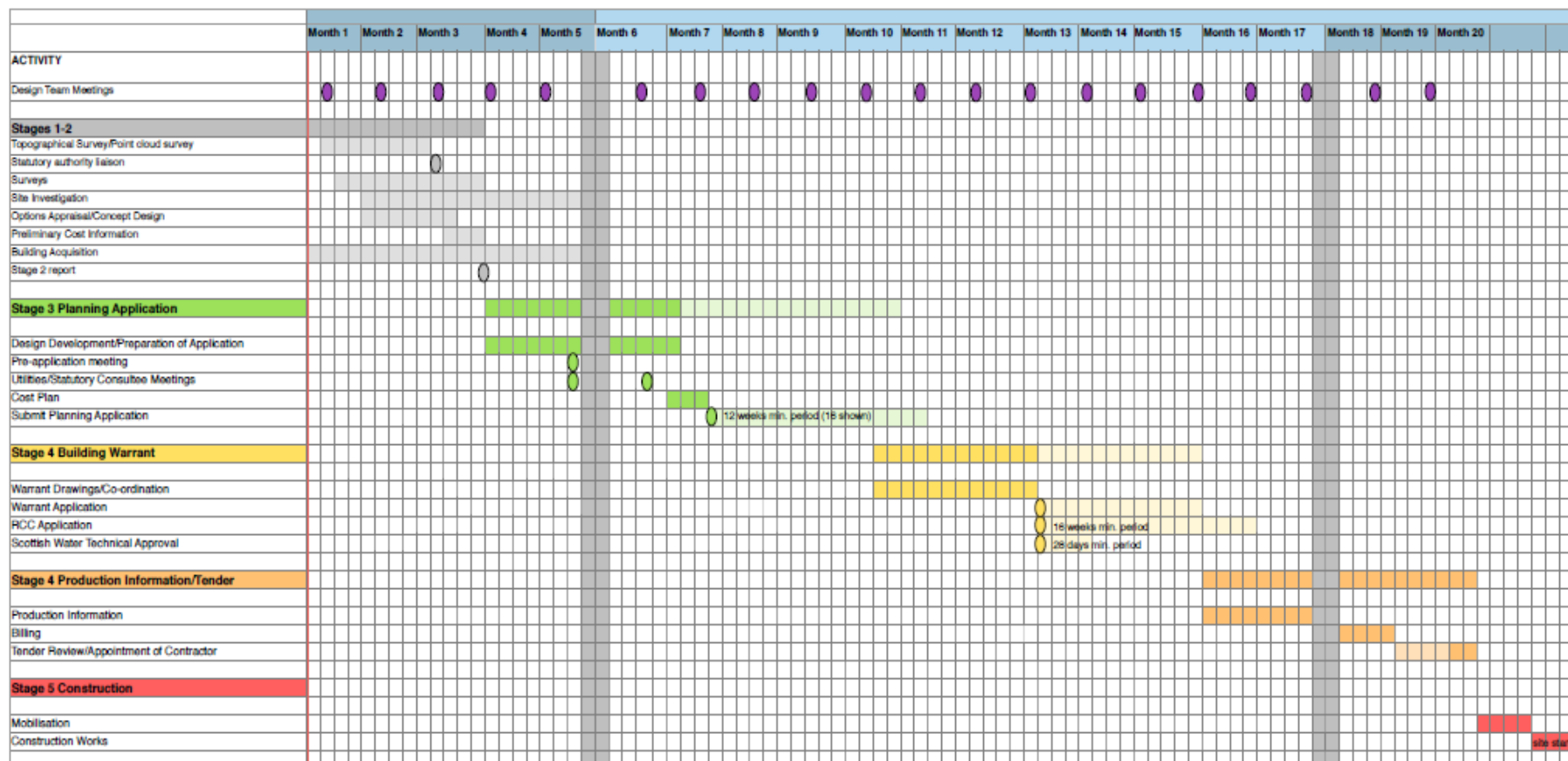
The outcomes for these phases will be to:

- secure funding to complete the “planning” phase of the project by September 2019. Further work to develop detailed business plans for each element will be undertaken in first half of 2019 with fully funded development phase beginning in October 2019
- secure full capital funding by autumn 2020 with construction beginning by spring 2021
- open Society Place in 2022

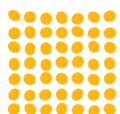


2.2 Plan – Planning and Capital Development Phase

Our design team, Collective Architecture, have prepared the project plan presented below and we expect Month 1 of this phase to be in early 2019. Contingencies, both in terms of time and cost, have been built into this plan and our capital costings (shown separately).



Based on the above project plan, we expect the capital build will start around Spring 2021 with the opening of Society Place planned for April 2022.



3. Research

3.1 Demonstrating the Need

Methodology

We carried out a feasibility study in early 2018 adopting a range of methodologies to understand how people wanted to make use of the building and how using this would be of community benefit as well as providing an opportunity to generate an income.

The Survey

A community survey was completed by 446 people locally; this was designed to test demand for services as well as to determine what gaps or needs exist in West Calder and the surrounding area for local people.

85% agreed that the building should be community owned and 83% thought Society Place was a good site for development of a “destination project”. The survey showed clear demand for more attractions to serve the wider West Lothian (and beyond) community with the top 5 choices for what is needed being community cinema/theatre, family friendly restaurant, retail unit, microbrewery and tapshop and heritage or museum space.

Stakeholder Conversations

We held two stakeholder meetings and in total spoke to over 17 stakeholders representing groups, schools, businesses and potential partners including heritage and tourism organisations. These conversations showed support to provide a range of commercial services and community benefit projects. Whilst there appear to be a number of competitors in West Calder offering something similar, none have everything in one space and their products or range of services target a different market so there is no concern that this would displace existing businesses.

Support has been offered to develop the tourism and heritage offering as part of what Society Place will offer. The Council will also help to develop Collections and to work with other tourist attractions to bring people to West Calder to visit Society Place. West Calder is seen to have a strong history in the co-operative movement and in shale mining and both will form the basis of a strong heritage offering.

Public Consultations

Two public events were held engaging 188 people in total. The first event showed 100% support for this project with people saying they wanted more sporting facilities, more for children and young people to do but also said that traffic is an issue. They want to “put West Calder onto the map – a destination”. This reflects findings in the CAP. They wanted to see a cinema, restaurant, youth centre and a play for music gigs or soft play.

The second event presented the findings from the survey and people were asked to vote on proposals. People favoured a family restaurant, community theatre/cinema, microbrewery, heritage and museum space and soft play.

Focus Groups

We spoke to 13 residents in the two streets leading up to Society Place, Gloag Place and Society Place to understand any concerns they have in developing this space. There is support for the project, but residents are concerned over parking, noise levels, how the build will impact on neighbouring houses and the impact a development may have on West Calder Community Centre. The consultation has recommended that residents should be represented on any steering groups for the development.



3.2 Demographic Profile – The Market we will target

A summary of key demographic data presents our target market:



West Lothian Population

There are approximately 178,550 people living in West Lothian. The largest age population group is 45-59 (22.4% of overall population) 19.7% of the total population is aged 0-15 while 21.1% is aged 60+ 48.9% of people aged over 16 in West Lothian are married (Scotland = 45.4%) and 32.1% are single (Scotland = 35.4%). By 2037 the population of West Lothian is projected to be 196,664, an increase of 11.7% compared to the population in 2012. Over the 25 year period, the age group that is projected to increase the most in size in West Lothian is the 75+ age group. This is the same as for Scotland as a whole. The population aged under 16 in West Lothian is projected to increase by 7.7% over the 25 year period. The 2015 estimate of the number of households in West Lothian is 75,782. This is a 1% increase in the 2014 figure of 75,035, compared to a 0.6 per cent increase in Scotland as a whole.

West Calder & area Population

3,745 people live in West Calder and Harburn; 91% of the population identifies as White British.





Housing

63.2% of households in West Lothian are owner occupied (Scotland = 62%) whereas 17.5% are rented from the Council, 9.7% from a private landlord, and 8.7% by a housing association.

The most common type of dwelling in West Lothian is terraced house (30.2%) followed by detached house (24.3%) and semi-detached house (24.2%).

West Calder - housing

1,414 households in West Calder and Harburn; 29% of homes are detached and 64% are owner occupied with 23% being socially rented. Most houses in this area sit within the lower Council Tax bands.



Economy

79.7% of the working age population in West Lothian is economically active (Scotland = 77.3%). Unemployment in West Lothian is currently at 3.9%. 40% of the population in employment is in a senior or professional occupation. Median gross weekly pay per full-time worker in West Lothian is £519 (Scotland = £547.7)

In West Calder 69% of working aged adults are economically active and a higher proportion of jobs is in skilled trades rather than professional occupations.



Vulnerable Groups

1.6% of West Lothian's 16-64 population is out-of-work benefit claimants (Scotland = 2.3%). 0.4% of households suffer from multiple deprivation (Scotland = 0.7%)

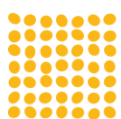
In West Calder \and Harburn 14.5% of the population is income deprived.

3.3 Learnings from case studies

During the consultations we heard from 3 similar projects, 2 in Scotland and 1 in England. These have shown us that challenges will occur during our journey to open Society Place and we will build these into our business planning and risk mitigation:

- We will build contingency into our build and development plans as we have learned that dealing with contractors may not always be straightforward
- Creating a “destination” through strong branding and marketing is vital to success
- Private investment will take years to secure but through building strong partnerships from an early stage, is possible
- We will ensure due diligence is conducted on each of our private investors and operational partners, where appropriate
- Having a strong USP is vital to set us apart from competitors
- Working with local tourism initiatives will help to put West Calder onto the map
- We will continue to build our Board's capacity, building on a really strong base, local knowledge, passion and community links
- We have been advised to prepare a business plan for each different element of our proposed business; this is best practice and we will consider this within our planning phase for this project





4. Analysing the Market

4.1 SWOT Analysis - WC&HCDT

Looking at our internal strengths and weaknesses and external opportunities and threats, we have devised a brief SWOT analysis as a snapshot of our organisation.

Strengths track record strong board skilled staff community support demonstrated need and demand strong links with specialist partners	Opportunities pilot ideas strong heritage in West Calder forming good partnerships and experts in their fields support from West Lothian Council's Tourism and Heritage team co-designing space with partners, parents and young people offering fully inclusive space provides a USP future of West Calder Community Centre
Weaknesses need to maintain consultation capacity of staff (resources rather than skills) capacity of board (more specialist skills needed)	Threats no guarantee of demand difficulty securing funding commercial aspect is risky BREXIT affecting disposable income the future of Scotland in Europe (impacting on disposable income) funding cuts to Council services generating a sustainable income as well as social community benefit future of West Calder Community Centre

4.2 Heritage and Tourism Market

In order to understand the tourism or visitor attraction market we will operate our heritage and museum in, we conducted robust market research to determine visitor habits when coming to West Lothian. This showed us that 826,000 day visitors came to West Lothian in 2017¹ with total visitor spend increasing from £171.17m in 2017 from £146.55m in 2010. West Lothian is within an hours driving distance for 63% of Scotland's population.

The most popular attraction in West Lothian was Five Sisters Zoo in 2016 attracting more than 180,000 visitors. This is another social enterprise based less than 5 miles from Society Place in Polbeth and has worked hard recently to promote itself firstly as a great visitor attraction. This has been as a result of expanding their site and more animal attractions.

4.3 Restaurant/Bistro Market

Local restaurants include The Fork& Field, Harburn Golf Club Bistro 19 and West Lothian College's Terrace, all offering a menu similar to what could be offered at Society Place. There are a number of other restaurants, cafes and pubs in West Calder but we aim to target a different market, being the family market and couples with a higher disposable income.

¹ Visit West Lothian, 2017



The restaurant market in West Lothian is concentrated on Livingston, Bathgate, Linlithgow and Whitburn with most venues being chain restaurants offering standard pub food from menus that don't often change. These chain restaurants are average priced at around £17 per head for 2 courses; the independent restaurants above, are likely to price their meals at an average of around £25 per head. At the other end of the market in West Lothian is the Champany Inn, in Linlithgow offering an expensive fine dining experience targeting a more affluent customer group.

We expect Society Place will sit at around £20 per head for 2 courses; prices will be further explored in our financial projections and marketing strategy.

4.4 Events and Weddings Market

Unitas Hall Wedding and Event Venue

West Lothian has a number of wedding venues some close to West Calder, including Harburn House and Linlithgow Burgh Halls. Market research suggests that the average spend for a wedding venue in the UK is £5,800 and the average number of guests is 77 for a wedding breakfast and 83 for evening celebrations. Couples also prefer to book one venue for everything. In West Lothian the number of people getting married has increased by 8% since 2013. Most weddings take place on a Saturday during the months of July, August or September. Bookings for more popular venues in West Lothian, including Harburn House and The Vue in Bathgate are taking bookings now (in 2018) for weddings in 2020. The age range when most West Lothian couples marry is 25 to 34, 57% of them marrying in West Lothian; 1,058 couples married in West Lothian in 2014 so there is a good sized potential market to reach. Wedding planners we spoke to suggested we make the venue a bespoke personal venue on the basis that this market is growing in West Lothian.

We understand that 59% of ceremonies take place at the reception venue so we will secure a licence to hold the ceremony. We also understand that couples will view a number of venues before deciding on one, and the decision will be made based on views, grounds, building, friendly staff, value for money and the ability to personalise the venue or ceremony. We will build this research and knowledge into our marketing plans which will be included in section 5.

Events and Exhibition Space

There are a number of venues in West Lothian used for events, with Howden Park being perhaps the most popular. They charge £121 per hour for commercial bookings and £91 for community bookings; this sets a benchmark for us to consider to determine whether we can compete on pricing alone. Other venues include West Lothian College and a number of local hotels including Mercure and Houston House Hotel.

Locally, West Calder Bowling Club and the Church hire their space out for funeral teas or private parties. It is not our intention to compete with local organisations and will work with them where possible by offering something different, at a different price, or to a different market.



5. What we will offer

5.1 Summary and development process

As outlined in the introduction and background section, a number of options were presented in the research, informed by community needs or gaps as well as by potential demand of what people would like to see offered in West Calder.

The challenge was to develop a range of services that met community need, worked well with existing services and facilities, would be financially viable and would offer wider regeneration possibilities. Certain concepts had to be re-thought and new opportunities became apparent. These are principally:

Brewery/Tap-Shop/Distillery

Initially the idea of co-developing Society Place with a private investor to provide the “destination draw” was appealing but a number of issues arose including: the complex nature of forging a partnership over a long development period; some negative feedback on brewing actually taking place on the premises and less community control.

National Cooperative Museum

The success of WC&HCDT’s Cooperative Heritage festival in 2018 and the feedback from national bodies, partners and potential partners led to the understanding that there was a gap in the celebration of the Cooperative Movement in Scotland (unlike in England) with no dedicated space or museum. It became apparent that there was a desire to help see this happen and a desire that it be an educational and accessible space that inspired. This had the potential to be a “draw” to the area and the Old Coop Bakery Building could be the perfect place for this.

Wedding and Events

Research showed that there was a lack of well-appointed large venues with character in West Lothian and the Central belt. It also showed that there is a preference for venues that can offer all-inclusive service and that this could offer some financial sustainability as well as employment and training opportunities.

Activities for Young People and Community Spaces

These facilities have been high on all community consultations conducted in the area. The challenge has been how to incorporate them in a fashion that doesn’t just “not compete” with existing facilities but augments and coordinates with them, furthermore, how the process of their development could development actually support the improvement and long term sustainability of other facilities and services locally. One approach was the specific “USP” approach to ASN/ASD discussed below which would not compete and in delivering a certain type of space that would allow the Community Centre to focus better on delivering best value from its existing spaces. Also the process of the partnership approach to developing the detail of these offerings would in itself be beneficial to the design of a sustainable and appropriate long-term offering at the Community Centre.

Additional Support Needs/Autistic Spectrum Disorder

Early on facilities for these often excluded communities was proposed as a potential use for Society Place but were not considered financially viable or to be central to a wider regeneration project. It is now evident that the opposite is true when this is considered in conjunction with the other strands of the proposal: in that the “hands-on” museum actively adds value to any service for these communities and there is a wide and willing market for activities that accommodate



both the needs of the ASN/ASD communities but also their wider families. The “ALL the family” approach is not just a desired service but one people are prepared to pay for.

The market and our services will be explored in section 5 within the marketing strategy.

5.2 Organisational Objectives

We will run this project with the focus on sustainability both in terms of financial viability as well as ensuring that our build and how we operate the building adheres to best practice to protect and celebrate our environment, making use of renewable energies where possible.

Our strategic objectives, in the first year of opening, are to:

1. Welcome 15,000 visitors
2. Work with 10 schools from Fauldhouse and Brierley Valley and West Lothian to offer educational sessions.
3. Hold 10 weddings or corporate booking events
4. Hold 8 community events
5. Work with 20 students from West Lothian College to offer work placements or volunteering opportunities.
6. Create 8 Jobs
7. Provide structured volunteering opportunities for 30 people in addition to students
8. Support 30 families experiencing challenges relating to ASD or ASN issues

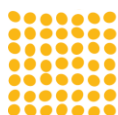
5.3 Museum & Heritage

What we will offer

We will become a registered Museum offering an interactive hands-on fully accessible and inclusive space aimed at groups such as local school children as well as local families and visitors from the wider area. A key element, which will provide us with a unique selling proposition, will be to make the space suitable for people affected by disabilities in particular those with additional support needs and we are working with Signpost a support charity for families affected by Autistic Spectrum Disorder and New Directions who work with people with learning disabilities or additional support needs to help with this. We will also work with accessibility experts such as Changing Places and ViewOpenDoors in Livingston, to ensure that equipment and the facilities are compliant, adequately specified and costed providing comfort, safety and the opportunity to interact whilst learning about local heritage. Another USP of this space will be interactive heritage mapping (currently being piloted in West Calder), virtual reality and augmented windows to create a memorable and inspiring educational resource.

We also understand the funding pressures in education and will aim to offer transport to schools within as part of our structured offering for schools at Society Place. We know this will help to bring schools to us and remove barriers in affordability. Making our heritage space accessible is as much about being able to afford to come to Society Place as well as being able to physically access our building. Learning from The Rochdale Pioneers Museum we plan to develop educational units that work with the curriculum.

Whilst part of this offering will be free access, we will also devise an educational programme which will be ticketed as well as ticketed museum Collections for visitors.



Developing the Concept

With a focus on local heritage and the co-operative movement in Scotland, the main strands of the Museum are likely to include:

“Hands-On” museum of Cooperation based on the concept of a “Children’s Museum”

This will be an activity based, paid experience which will combine multi-media (mapping, augmented reality, audio-visual), “hands-on” experiences (puzzle solving, dressing-up, role play, reminiscence, object handling) based on the subject of Cooperation. An inspiring, fun and educational space, lessons and inspiration have been taken from The Science

Museum, Eureka, the American Children’s Museum Movement, Summerlee, The People’s History Museum, The Manchester Museum of Science and Technology and The Rochdale Pioneers Museum.



National Gallery of Co-operation showcasing more traditional artefacts

A mixture of permanent, temporary, paid and free exhibitions celebrating the Cooperative movement in Scotland. This will take learning from The Rochdale Pioneers Museum, The People’s History Museum, New Lanark and the National Mining Museum and will also incorporate a climate controlled storage area for safe holding of a Scottish Cooperative Collection.

Local Heritage Gallery

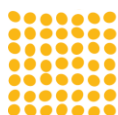
A free space made up of gallery and museum celebrating the heritage of the West Calder area.

Education and Community Spaces (in conjunction with Society Hub)

The free spaces above and space within Society Hub will function as flexible community event and education spaces.

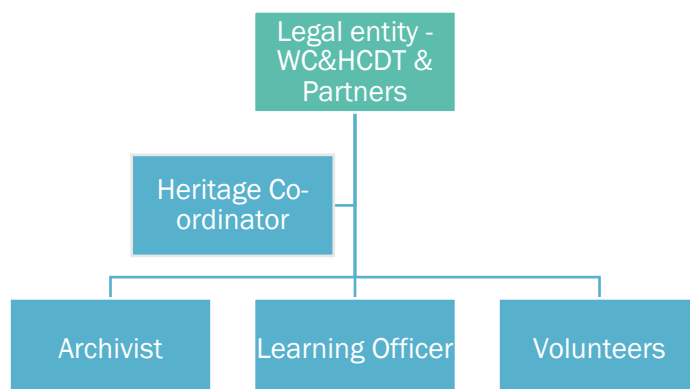
Shale Trail Southern Hub

The successfully funded Shale Trail (WC&HCDT is a steering group member) will have a southern orientation hub for the walk which will link in with the local heritage on display and The Shale Museum at Almond Valley.



Our Operating Structure

We will form a separate legal entity working with a number of partners (below) employing staff with expertise and skills in developing and managing a Museum.



Heritage Partners

Our heritage partners will assist and support us to develop our museum space. We have already started to develop partnerships with the Co-operative Heritage Trust; Scotmid Archives; West Lothian Archives; BP Archives; West Lothian Council; Viv Wood Gee Associates; Lothians & Fife Green Network Partnership; Almond Valley Heritage Centre; The Cultural Cooperative; The Cooperative Education Trust and The Cooperative Party. With these partners we will get the expertise we need to develop our museum, to build up valuable Collections and to offer a great visitor attraction and educational resource for locals and visitors alike.

Tourism Partners

We will also work with a range of local visitor attractions including Five Sisters Zoo and Almond Valley Heritage Centre. Rather than competing with these venues, Society Place will offer something different to the zoo and we hope that we can signpost visitors to these attractions and them to ours. Working with the Almond Valley Heritage Centre will provide us with an opportunity to run a co-ordinated heritage programme of events and collections. These partnerships will be developed in the early planning stages of our project.

5.4 Society Place Bistro and Cafe

What we will offer

Research indicated that people want a family friendly restaurant in West Calder and we are aware that there are several established restaurants already operating in our area and will not compete with them.

Instead we will offer something different; quality bistro food, in a family friendly and accessible environment, staffed by students gaining work experience from a local and independent organisation. However we also understand that we need to pilot what is offered in the bistro including the pricing and the menu.

We will approach this strand in two phases:

1. Establish an operating model working from the existing community café we run in partnership in West Calder Community Centre. This will start off by developing what is already offered there – café food but expanding the menu and extending the opening hours as well as introducing work placement trainee positions with students from West Lothian College and The Larder. We will monitor sales, covers, menu choices, pricing and customer satisfaction as well as monitoring success for the students to ensure they

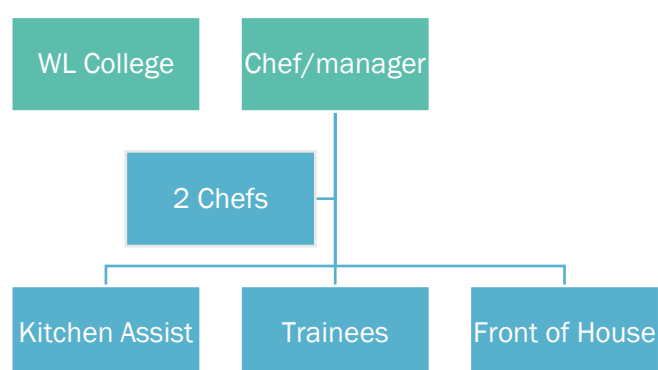


gain qualifications, and can move into sustainable employment. We will make changes as we need, to the menu, opening hours and staffing mix but if successful and we achieve targets set, we will move to phase 2.

2. The second phase will be to expand the café and offer a “pop up bistro” experience whilst we again pilot what should be offered and how to operate this as a viable business. From here we will develop into a trading bistro, using a larger training kitchen, developing a more diverse menu, but sticking to set menus where possible to reduce food wastage, increasing the number of covers and our opening hours.
3. Phase 3 will be the expansion of the Café and Bistro to Society Place
4. Phase 4 will introduce catering for events taking place in our events or exhibition space in Society Place, and leading to outside catering for other venues subject to demand.

Our Operating

Structure



Partners

The Development Phase will be a time to focus on securing strong partnerships and to deliver the catering and event management element of Society Place, we will research opportunities provided by working with independent catering partners as well as the College and Community Centre (see below). We will then develop memorandum of agreements with all key partners.

Our key partners helping us to develop and deliver a family or fine-dining experience for customers will be West Lothian College and West Calder Community Centre. We have already developed links with the College to offer work placements and volunteering opportunities and we are working to develop what is offered very successfully at The Terrace at the College. This link provides the College with another option for students to train and work from. This allows the College to train and support more students towards qualifications, linking them up with employment opportunities Place and it gives us access to skilled local students and a workforce.

We will where possible, develop a local supply chain using suppliers, farmers and producers from the local West Lothian area.

Head Chef

A Head Chef with experience of running a kitchen providing a café and bistro menu will be employed and they will line manage kitchen staff as well as being responsible for ordering, stock control and health and safety. They will oversee 2 Chef positions and a Kitchen Assistant. This team will work with the Events and Front of House Coordinator.



5.5 Unitas Hall Wedding and Event Hire Venue

What we will offer

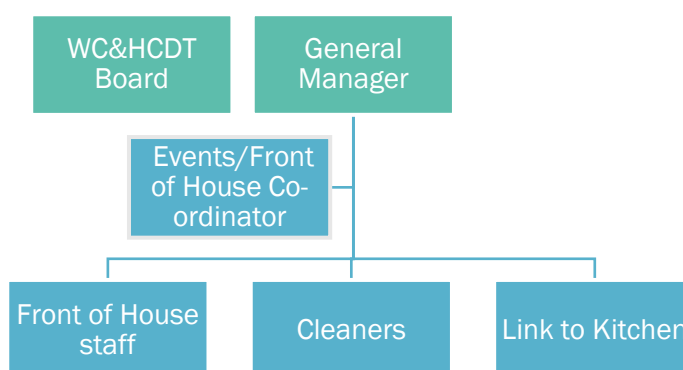
Space will be allocated on the first floor of Society Place, providing a fabulous view over the Five Sisters and large open plan space which will be suitable for corporate bookings, private parties, weddings, exhibitions, drama and music performances, film nights and other social gatherings. The space will be flexible and will be made into multiple smaller rooms or 2 large open plan spaces suitable for weddings of up to 120 people

The views from the room will sell this space. The rooms will have high ceilings with original ironwork trusses on display and an industrial urban retro feel.

Catering will be provided for events through the bistro/café in Society Place.

Our Operating Structure

We aim to manage the operation of the event space through the Trust. We have a good range of skills and experience in house currently and intend to employ an experienced Events Co-ordinator working under the General Manager.



Partners

One of our key partners to deliver a professional events package will be West Lothian College, with catering being the link between the event space and the Bistro and Café.

We will also develop links with independent local wedding planners and licensed wedding celebrants to help us to promote Society Place and Unitas Hall as a unique venue for weddings.

The Events and Catering business, with an emphasis on Weddings, will be subject to detailed business planning and costing during April and May 2019 with consultancy resources secured through the Enterprise Accelerator programme.

5.6 Retail

Retail opportunities will be provided throughout the ground floor and basement, with cabinets exhibiting and selling quality souvenirs, crafts and artwork linked to the Museum as well as a range of locally produced jams, chutneys produced by trainees in our Training Kitchen.

We anticipate that stock will grow as we gain an understanding of what local people and visitors want to spend money on and how we can best celebrate our local heritage through what we sell at Society Place.

It is possible, in future years when we consider the future of The Stables block, that a shop could be developed to sell locally produced and baked artisan breads and cakes.

5.7 Society Hub & Community Services

As discussed above, the research during the feasibility study into Society Place suggested that local people would like to see more sporting activities and space for young people's activities. Rather than displacing what is already available in West Calder, we will work with partners such



as West Calder Community Centre, who are considering how they can develop what they offer to meet these needs in a more fit for purpose space.

What we will offer

The Society Hub - purpose designed space for those with additional support needs and their families. We are working in partnership with a local support charity to develop this, potentially providing them with a base and enabling them to offer training, services and meeting space for the families they support. By co-designing this space and what we offer from it with people who are directly affected, we will create something very special that will be a place they want to come to. We will also work with specialists, parents and young people to develop a programme of activities complementing what else is going on in West Lothian

Community Group and Education Space (including flexible use of the exhibition spaces) – this will complement and augment those in West Calder Community Centre ensuring best use of space across the two buildings.

Community partners

Signpost, New Directions and the ASD resource at St Mary's Primary School are supporting us on integrating accessibility into the heart of this project as is a group of parents of children and young people with ASD. Working with these partners will help us to ensure that the space will be designed with the needs of people affected by disabilities will be supported and what we offer can be accessed by everyone. It will be the first fully autism friendly visitor attraction in Scotland and as such, will be innovative and set us apart from our competition when attracting visitors.

Working with West Calder Community Centre

The consultations we held suggested a need for sporting facilities and soft play, both of which are already offered in and around West Calder. However these needs are clearly a priority for local families and we have developed strong links with West Calder Community Centre and the Management Committee there to work together, ensuring that both venues will, between us, offer what the community needs. This is reflected in our phased approach and how we will manage this project, with our focus being to develop an initial Café offering from the Community Centre, expanding it into Society Place at a time when we expect the Centre may need more space for sporting and physical activities. The future of the Community Centre will be considered separately but we are working in partnership with the Committee on this journey together.

WC&HCDT are already based at West Calder Community Centre, deliver a community café in partnership with them, run events and activities in the centre, share several key Trustees, have agreed on working together on developing a model for more community control of assets in the area and have a functioning Partnership Group and Joint Youth Activities Group.

5.8 Accommodation Matrix

Appendix 1 shows architects' drawings for the layout of space in Society Place. The accommodation schedule below shows how spaces will be used and considerations to be made when designing space, fixtures and fittings as well as the ambience. More detail on the accommodation design and sizes can be found in the architect's Design Development Study of March 2019.

	Element	Space and Facility Needed	Comments
OUTDOOR SPACE			
Ground Floor	Courtyard	Landscaped space overlooking the Five Sisters (to the rear of the Courtyard);	Safety - thinking about traffic; parking in particular



		seating (sheltered from parking) Outdoor seating for customers of the café into the Courtyard	Considerations for local neighbours Creating a sheltered comfortable space for outdoor seating with great views over the Five Sisters; safe and secluded from parking
	Parking and access	Disabled parking; access for minibuses Disabled access into Society Place Loading/unloading area to front of building Remote parking facilities - West Calder Community Centre and Business Centre potential but detailed discussion with Planning Department required.	Space to be safe for access for buggies and wheelchairs Connecting up with public transport links – bus and train timetables
BASEMENT			
	Outdoor area	Sunken garden/outdoor classroom with outdoor seating and sensory garden.	
	Indoor area	Office space for partner charity, quiet spaces, meeting rooms for support services, flexible spaces for interactive learning and group learning and community events. Storage.	
	Lift	To ground and first floor levels	
	Changing Place	Large full adults changing room with washing facilities	
Storage	Basement	Secure storage for bicycles Access from Courtyard space to storage in basement	Bike rack with cover
Toilets		Disabled Baby Changing Toilets	
INDOOR SPACE			
First Floor	Exhibition, Weddings and Event Space	Large open plan; partitioned space available to create smaller rooms Large windows over Five Sisters (USP) Original architectural heritage exposed	Create an innovative, romantic, relaxed environment Simple modern retro urban



		and retained	chic
	Office space	Space for 6 staff Open plan layout	Wifi enabled
Ground Floor	Café/ Bistro	Space for ??Seats in cafe/bistro setting Child friendly Autism/disabled/dementia friendly	Adaptable layout and decoration/ feel to allow for café and bistro environment; comfortable either way
	Shop	Traditional village shop layout, celebrating heritage and making use of original features Include information boards showing what's on and leaflets, flyers for ticketed public access events coming up at Society Place Selling heritage items, crafts, arts and local produce	
	Heritage/ Museum	Large open plan space dedicated to semi-permanent Collections Additional flexible space to be used for educational trips providing interactive learning space	Wifi enabled VR Augmented reality window
Toilets		Disabled Baby Changing Toilets	

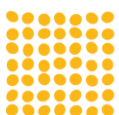
5.9 Usage Schedule

Our opening hours will vary according to the activity we offer. Initially we will open 6 days per week, shut on a Monday, but this will be reviewed and changed as appropriate.

Facility	Opening Hours	
	Tuesday to Friday	Saturday and Sunday
Society Place Bistro and Cafe	10 am to 3 pm 5 pm to 11 pm (last orders 9.30 pm)	10 am to 3 pm 5 pm to 11 pm (last orders 9.30 pm)
Museum	11 am to 4 pm	10 am to 4 pm
Retail	In line with opening for other spaces	



Unitas Hall - Events and weddings	Space to be opened up for events as appropriate	
Office space	9 am to 5 pm	Closed



5.11 Parking

Parking has been identified as an issue. We will have a number of disabled parking spaces in the main Courtyard outside The Stables block. These are shown in the architect's drawings in section 4.10 above. This will be further investigated during the detailed business planning and Planning Application stages of our asset transfer request to West Lothian Council.

We are investigating working with West Calder Community Centre, NHS Lothian and the Council to arrange a remote parking plan for Society Place. This could involve parking at the Community Centre and Business Centre, being less than 5 minutes' walk from Society Place.

We will also ensure that there are directions from the train station and local bus stops showing how to get to Society Place for those using public transport.

5.12 Social Outcomes

This is fundamentally a regeneration project, using the local asset of heritage, led by a community organisation that is focussed on positive social outcomes for the residents of its immediate area and the wider West Lothian area.

Service	Social Outcomes	Market
Museum	Local people (especially young people and those affected by disability – particularly those with additional support needs) will learn about and engage with our local heritage; local people will be able to contribute to our community's heritage through our heritage mapping project; there will be more opportunities for intergenerational groups learning together; more visitors will learn about shale mining and our Co-operative heritage; west Calder will become more of a destination bringing more people here; more jobs will be created	Visitors Local families Schools Community Groups
Society Place Bistro and Cafe	More local people will be involved in volunteering and employability schemes; more local young people will be trained and gain work experience in hospitality industry; more jobs will be created; more parents could learn cooking skills West Calder will become more of a destination, bringing more people here; the local economy will be strengthened (through jobs and supply chain) and encouraging greater spend in local shops.	People from West Lothian Families and groups from West Lothian
Unitas Hall – weddings, parties and corporate bookings	More local people will be involved in volunteering and employability schemes; more local young people will be trained and gain work experience in hospitality industry; more jobs will be created; more local people will have access to reasonably priced, contemporary heritage space to hold events and large meetings West Calder will become more of a destination, bringing more people here; the local economy will be strengthened (through jobs and supply chain). Income will be generated and surplus will be invested in facilities and services in the local area.	Local people from throughout West Lothian and the Central Belt
Connecting people	More older people will have more choice of places and groups locally; older people will benefit from getting together in groups to learn and try new hobbies or	Local older people (West Calder, Polbeth



	activities. Parents of children and young people with additional support needs will feel less isolated and benefit from more peer support opportunities.	and Harburn), community of families affected by disability and ASD, National community of Cooperatives
Space for young people	More young people will have a better range of activities to attend within Society Place – and with links to West Calder Community Centre access sporting facilities); more young people will benefit from social interaction and peer support from group activities and take advantage of the space to learn and develop skills.	Local young people (West Calder, Polbeth and Harburn and wider Fauldhouse and Brierley Valley)

5.12 Measuring our impact

We will develop monitoring tools to measure progress against milestones and targets during our transitional trading as part of the Planning and Development Phase. These will measure:

- Number of trainees; track journey of trainees; qualifications gained by trainees; trainees securing sustainable employment
- Number of volunteers involved with each element of Society Place; tracking their journey understanding the skills that volunteers gain through volunteering
- Sales – split into café, bistro, museum, retail and events
- Bookings – split into number and type of events booked at Society Place
- Footfall – in the Museum, café, Bistro and retail
- Jobs created – in the Museum, retail, catering and event management
- Cost controls – continuous monitoring of costs both in terms of capital build as well as revenue costs and overheads going forward
- Satisfaction – measuring how people feel about Society Place and what we will offer there, encouraging us to continually adapt and improve our services in line with our customers' expectations and needs
- Relationships with partners – monitoring key milestones and targets to ensure each partner is delivering on their expectations as laid down in partnership agreements



6. Marketing Strategy

6.1 Objectives

Our marketing objectives will focus on increasing awareness, maximising footfall, increasing sales and becoming a destination for both locals and visitors to West Calder. Full SMART (specific, measurable, achievable, realistic, time related) objectives will be agreed and detailed in our Business Plan.

6.2 Our Customers and Activities

In summary the table below presents the features of what we will offer and who we will target. A full marketing plan will be developed as part of our business plan.

Commercial Space		
Space/ Activity	Features	Target Market
Museum	Programme of exhibits/ displays; educational programme; themed events; visiting displays; programme to compliment Almond Valley Heritage Centre	Visitors; locals; families; education groups
Society Place Bistro and Cafe	Gastro pub experience; menu changed seasonally; local produce used; family friendly; kids menu; café menu offering coffee/tea, snacks, light lunches; bistro menu offering evening meals	Locals; visitors; people resident in wider West Lothian area
Retail	Niche; retro; unique; selling “heritage” high-end produce not competing with existing retailers in West Calder	Locals; residents of wider West Lothian area and visitors to museum
Unitas Hall - Event/ Exhibition space	Space that can be flexible in size and use; to be used for meetings, social gatherings incl parties; wedding venue; exhibition space for local artists and crafters as well as event space for corporates	Local businesses; residents of wider West Lothian area and from central belt of Scotland; locals (for weddings and parties predominantly)

6.3 Branding

We will hold a branding workshop as part of the detailed development process to identify our brand values and personality for Society Place. Branding will reflect the history of Society Place and our proximity to the Five Sisters, as well as reflecting the use of innovative learning tools and our approach to employability and training that will make the venue a unique visitor attraction in West Lothian.

Branding will then be consistently used in our marketing material, social media and website.

6.4 Competition

We will try not to compete with local businesses by offering a destination with a strong focus on heritage.



- Museum – Almond Valley Heritage Centre in Livingston and Linlithgow Heritage Trust are two charities operating in the area offering a heritage experience. The Heritage Centre combines a petting zoo with soft play, café, outdoor play areas with a small heritage centre offering exhibitions centred on the shale mining industry in West Lothian. Linlithgow Heritage Trust has recently secured funding to celebrate the “royal” heritage focusing on the history of Linlithgow Palace; this will be based at newly refurbished Linlithgow Burgh Chambers and is planned to open in late 2019.
 - *What makes us different?* Our use of technology potentially including VR, window and interactive nature of exhibits. Having our space designed specifically around the needs of people with additional support needs, we will be the only fully accessible visitor attraction in West Lothian.
 - Interactive heritage mapping making use of new technology to provide VR and 3d learning experiences aimed at children.
 - Making use of real stories from local families that have lived in the West Calder area for generations; building on these local photos, stories and memories to build up a truly personal journey through the years.
- Visitor Attraction or Destination – Five Sisters Zoo was the most visited place in West Lothian in 2017 followed by Almond Valley Heritage Centre. The Zoo is less than 5 miles from Society Place and as a social enterprise, we are developing links with them to help us to promote each attraction so that visitors will spend more time in the West Calder area perhaps visiting two spaces in one day trip if they are coming from outwith West Lothian. For local people, particularly with young children, Society Place will offer more of a hands-on learning experience that will be fun whilst using real stories, families and memories to tell people about the history of West Calder and immerse them in family life over the last 100 years.
- Café and Bistro – there are a number of cafes and restaurants in and around West Calder offering traditional café or restaurant menus. West Lothian has a wide range of “chain” restaurants but there are only 2 more unique independent options in the area being Bistro 19 at Harburn Golf Club and The Fork and Field in Mid Calder. Both offer more gastro pub food and both are booked out in advance suggesting demand for this type of cuisine.
 - *What makes us different?* We will be different in the way heritage is a focus throughout the building with the original architectural features being retained in all areas of Society Place where people will enjoy a modern, urban industrial chic. The front of house and kitchen staff will be trainees provided through links with West Lothian College and whilst they are training, they will offer a high quality of customer service and hospitality under the supervision of trained and qualified staff, again linked to the College. We are also unique in that profits or surpluses from the café or bistro will be reinvested into our community spaces and learning experiences. Our pricing will be competitive.
- Shop – there are a number of shops in West Calder including supermarkets, sewing shops, butchers, newsagent; none of these shops will sell what we plan to sell in Society Place.
 - *What makes us different?* We will sell items celebrating the heritage we will learn about in the Museum and we will also sell arts and crafts and jams and chutneys made by local people; our stock will change regularly.
- Event and Exhibition Space – Harburn House, The Vue in Bathgate and Howden Park Centre in Livingston offer similar space to a similar target market. Weddings,



performances, exhibitions are held in Howden Park Centre with The Vue and Harburn House focusing more on weddings or corporate bookings.

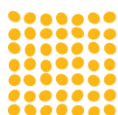
- *What makes us different?* Our building. By refurbishing Society Place and bringing the space back to life in its original form, we are offering a unique but modern venue which looks very different to our competitors. With views over the Five Sisters from our main event space on the first floor and providing an outside platform overlooking these views that no other venue has, this offers a brilliant backdrop for photographs. Wedding planners told us that the location and views are a key part of the buying decision when booking a wedding venue and we will offer something truly unique at Society Place.

6.5 Marketing Communications

Our communications plan will include:

- Social media plan including use of Twitter, Facebook, Instagram and other social media platforms used by our target market. We will build on the strong presence we have with the Trust, building up followers and raising awareness as we move through the development and build process.
- Website development will focus on providing an online booking functionality for the Bistro and providing information about what's on the Museum. Links to our partners websites.
- Developing partnerships will be a key part of our marketing particularly in years 1 and 2; this will scope out expectations and roles of each partner into memorandum of agreements as well as looking at potential joint marketing projects
- Personal selling will be expensive but we will create a small budget to allow us to go to local tourism exhibitions held in West Lothian
- Developing our services or activities will be done by working with partners such as West Lothian Heritage and Museums Team, Visit West Lothian and the Co-operative Trust to scope out what we are offering, identifying the features and benefits and building up a strong profile of our target market
- Market research will continue building up a knowledge of the local market and understanding what they will want from a café, bistro and from our Museum space. This will provide us with a clear idea on pricing and expectations
- We will build up a database of potential customers who want to be involved and want to be kept advised about what's going on; this will comply with data protection guidelines (2018).
- We will develop a range of marketing material that we can use to tell people about what Society Place offers. This will include banners, flyers and posters to take to exhibitions and to leave in community centres, libraries and places where people will go.
- We will develop a strong brand identifying our brand values and personality so that we become well established and well recognised for quality of service, food and learning.

We will where possible, work with students from west Lothian College to assist us in devising marketing campaigns and designing marketing material to use as well as to develop our website and social media campaigns.



7. Structure and Management

7.1 West Calder and Harburn Development Trust

WCHDT is a company limited by guarantee with charitable status and was incorporated in 2013. The Trust has 10 directors and 7 staff and currently has a membership of 90. The organisation is in a strong financial position with accounts for the year to 2018 showing income of £202,232 and reserves of £62,205 (£16,775 unrestricted). In the last few years the Trust has built up a successful track record of fundraising, some of which is provided through local windfarms.

The board meets on a monthly basis and has strong and robust governance supported by an experienced and skilled staff team.

7.2 Board Capacity

We have a strong board with a mix of skills, experience and ages.

Gavin Henderson (Chair): Gavin is a Senior Civil Servant with The Scottish Government working at a ministerial level. He is also an ex-trustee of Citadel, a long standing youth charity in Leith. Gavin lives in West Calder with his young family and brings a high level of managerial, funding and strategic management experience to the team.

Steph Gibbs (Treasurer): Steph is an Actuary and works in Edinburgh. She brings a wealth of financial and risk management experience to our team. Steph also lives in West Calder with her young family.

Alan Bryce: Alan is a local businessman who grew up in and currently lives in West Calder. He and his wife are foster carers for several children. Alan has a great local understanding of the community and economy and knowledge of issues being faced by the younger generation.

Carolyn Craig: Carolyn is Chief Executive of New Directions, a Livingston based third-sector organisation that works with people with ASN. Carolyn lives in West Calder and brings great strategic understanding of the Third Sector, specialist knowledge in supporting those with additional needs and managerial experience.

Kate Sneddon: Kate is a social worker who works in West Lothian and lives in West Calder with her young family. Kate's understanding of the issues facing people in areas of deprivation and practical solutions to those is an invaluable resource.

Iain Gillespie: Iain is a financial advisor and also Chair of Harburn Village Hall Association. Iain brings both financial experience and helps ensure The Trust has a good partnership with organisations in our rural areas. He lives in Harburn with his young family.

Craig Meek: Craig works as a housing support officer and manager of a local sheltered housing complex. He is also Chair of West Calder Community Education Association and as a key local volunteer brings a wide knowledge and experience of local issues and opportunities. He lives in West Calder with his young family.

Joan O'Donnell: Joan is a manager of a local sheltered housing unit and is Secretary of West Calder Community Education Association as well as of West Calder and Harburn Community Council. She lives in West Calder and brings huge experience in the administration of organisations particularly in times of change.

Jock Kerr: Jock is an experienced youth worker with West Lothian Council and is a long standing trustee of West Calder Community Education Association. Jock brings a keen understanding of the requirements of our younger community and coordinating with council services. He lives in West Calder.



Frank Boles: Frank is retired Headteacher of St Mary's Primary School in Polbeth with a long career in education in West Lothian. Frank also brings a wealth of community knowledge and has been involved in community activities for a long time. He also lives in West Calder

A skills audit conducted in 2018 suggested that the Board has strong skills in the areas of working with people, but that areas where they needed to develop skills were in volunteer management, some areas of marketing communications development and in financial management and marketing.

Since then we have: recruited a professional actuary and financial advisor to the board, improved our financial systems and undertaken training on financial management; expanded the marketing and communications staff role and held board training on marketing and communications and recruited an experienced volunteer coordinator who has developed strong models and procedures in linking volunteering to health and wellbeing.

We have a strong staff team supporting the Board but understand the need for Board members to be familiar with everything we do and an understanding of our processes. We will include a training plan in our full business plan and board recruitment plan focusing in particular on recruiting board members with marketing expertise, as well as experience of events management, heritage and hospitality.

7.3 Staff Team

Our existing staff team at WC&HCDT consists of:

Matt Pearce, Trust Manager (f/t) – Matt brings experience of professional building renovation project management, business development, catering and event management, strategic development and fundraising as well as a good knowledge of the Community and Third Sector.

Chrissy Fifield, Volunteer Development (p/t) – Chrissy is a trained Occupational Therapist who has worked extensively on partnership approaches to tackling health and wellbeing issues. She is able to build strong and effective partnerships with delivery partners and ensure what we offer actually helps improve life for our community.

Mhairi Goldie, Communications, Marketing and Events (p/t) - Mhairi is both a graphic designer, an ex-publican and an event and wedding coordinator. She brings an enormously useful range of skill to the team as well a tireless commitment to community development.

Niamh Brannan, Administration and support worker (f/t) - Niamh supports the whole team with an emphasis on supporting volunteer led activities and youth based projects as well as administration. She was originally employed through StepsN2Work and is now a key member of the team.

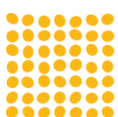
Errin Anderson, Aspiring West Lothian: Polbeth (f/t) – Errin works in Polbeth, employed by WC&HCDT, to develop community capacity and deliver local projects. He is an experienced CLD youth worker who has spearheaded the Trust's support of its neighbouring community.

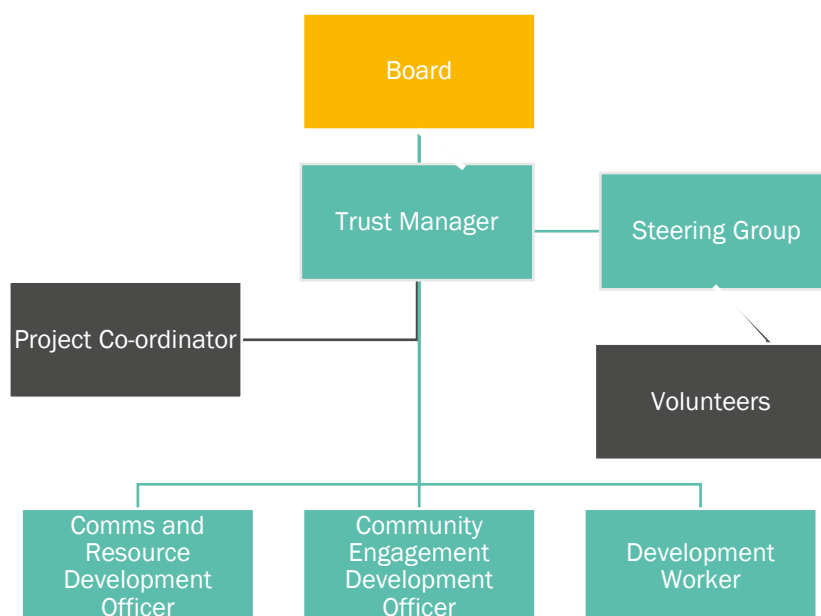
Denise Maxwell, Café Coordinator (p/t) – Denise has huge experience managing catering and events in large operations and supporting students in their on-the-job training. She is critical to coordinating catering volunteers and managing our growing catering operation.

Leona Heron, Kitchen Coordinator (p/t) – Leona is a cook who understands the social benefits of the environment she creates and works to add activities and support to the customers of our Community Cafe

Staffing Society Place – Planning, Development and Build Phase

We will establish a team to oversee and manage the development phases of the project:



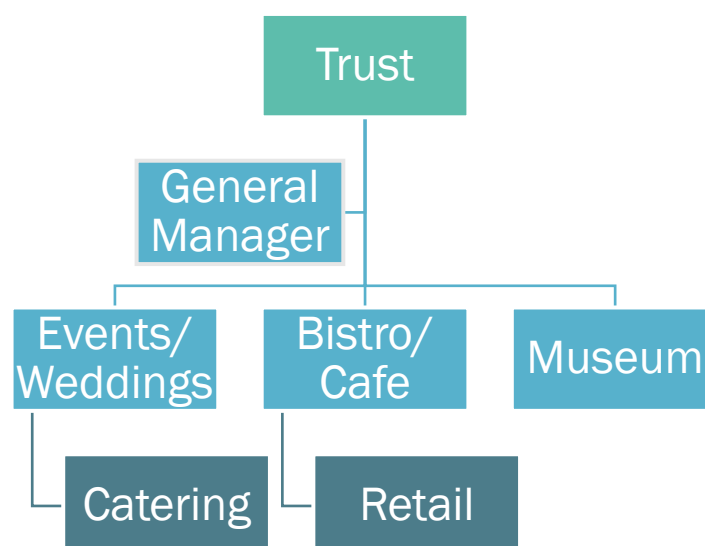


Project Co-ordinator

This new role will be a part time role at 25 hours per week for a 2 year contract. The role will be responsible for co-ordinating the build phase, working together with the Trust Manager. The role will also work closely with the Comms and Resource DO to ensure the local community and key stakeholders are kept updated on progress with the project.

Staffing Society Place – Operating

The staffing complement will change when we open Society Place and at this stage we expect the structure will be as shown in section 5, with the different elements of the project running autonomously but with overall management by a subsidiary of WC&HCDT or a separate trading company. We will continue to encourage volunteers to be involved working alongside staff members.



Staff roles are outlined below:

General Manager



When Society Place is open we will employ a General Manager with experience of managing a visitor attraction and cafe/bistro; this will be a full time post. Important skills and experience at this point of the project will be managing a visitor attraction, promotion, line management for retail, front of house staff and shop staff, community engagement, stakeholder and partnership management and administration.

Support Staff

A number of support staff will be recruited to work in the café/bistro, museum and the shop. These staff will have customer service experience and training opportunities will be created by working with our partner, West Lothian College for the café/bistro in particular. Jobs created will include shop assistant (1 initially); café and bistro waiting staff (4 staff initially); cleaner (2 initially). Shifts will be 7 hours maximum.

These support roles will work alongside and with the support of volunteers from our local community.

Steering Group

We will establish a steering group which will be responsible for overseeing the planning and development stages. This group will report directly to the Board on a monthly basis and will monitor agreed project milestones during the planning phase, moving this on to monitoring sales/income targets and costs when Society Place opens during its first year.

The steering group will include representation from local residents, partners, stakeholders, the Board, WC&HCDT core staff team, local young people and older people and experts in the specific project fields.

Involving Volunteers

Volunteers will be a key aspect of making Society Place a unique visitor experience and destination. Our volunteers will be local people with real passion and knowledge of the history of our local community; this will be important in differentiating what we offer against our competitors.

Volunteers will provide something different when dealing with customers particularly in our heritage experiences; local stories, memories and family connections can be shared adding real value to the customer experience and also encouraging people to talk about Society Place recommending us to others.

WC&HCDT currently employ a Volunteer Coordinator and have developed a robust model and procedures for both traditional volunteering, volunteering and meaningful activities for health and well-being and work placements and student support.

7.4 Working with Local Partners

We have already given some information about working with key partners for different strands of we will do at Society Place (section 4). We will also work with a wider range of organisations in West Lothian in a number of ways:

Partner Organisation	The Partnership Opportunity
West Calder Business Association	Communication is key to ensure collaboration rather than competition; may be difficult to engage with them; growing the economy together to benefit all businesses – making West Calder a destination



West Calder Community Council	Working together to create a destination in West Calder and West Calder brand which will regenerate local community and economy; collaboration to make use of community spaces effectively and creating specific uses for community buildings signposting people between locations and advising “what’s on”
West Calder Community Centre Management Committee	Partnership working from an early stage to ensure services offered at both locations (Community Centre and Society Place) complement each other rather than compete; ensuring that locals don’t perceive a threat to the community centre and see how all community facilities will fit together under the West Calder brand
West Lothian Council	A range of teams from community regeneration, economic development and Business Gateway will work together to support WC&HCDT through this project as it develops
Five Sisters Communities Stoneyburn Futures	Creating links with projects elsewhere in the “Five Sisters” community – opportunities to create physical links through development of path networks between West Calder, Harburn and Stoneyburn, Addiewell, WAT IF area and Polbeth; opportunities for collaboration on range of community benefit projects perhaps working towards Society Place being a base for some of these
West Calder and Polbeth Community Gardens	This organisation already attracts a number of visitors from outwith West Calder to the area with their Stick Man track. Development of Society Place will provide opportunities for signposting visitors between locations, helping each other to increase footfall and awareness of events and initiatives taking place
West Lothian Council Museums and Archives West Lothian Council Arts Team Visit West Lothian	These three organisations have advised they will help WC&HCDT in a variety of ways, including help with funding applications as well as help to put together collections in the heritage space or museum, assist with developing arts projects to create innovative approaches to delivery of these, and bring WC&HCDT together with other tourism venues and attractions in West Lothian to drive more people to the whole area benefiting all venues
Almond Valley Heritage Centre Five Sisters Zoo	Working with Visit West Lothian to collaborate with all visitor attractions in the area but particularly with these. Working together to co-design and co-deliver programmes of education and learning in heritage and raising awareness of events, shows and activities taking place at all venues – aim to drive people to all attractions to spend time in West Lothian rather than just going to one attraction
WAT IF?	WAT IF? Have updated their Community Action Plan from 2018 onwards and may consider offering a “heritage centre”



	attraction; collaboration with them in co-delivery of this project may help them to deliver some activities from Society Place or signpost people to what's going on in both locations. Create better physical links with the WAT IF community through improved path networks encouraging physical activity as well as more connectedness between these communities and West Calder and Harburn.
Schools – West Calder High; Parkhead Primary and St Marys RC Primary	Working with all schools to encourage groups of students to come to Society Place to learn and take part in educational heritage events, heritage mapping and hands-on interactive learning experiences. Bi-product of this will be the ability to reach out to parents of all children raising awareness of all other activities at Society Place, attracting customers to the café/bistro, retail spaces or community cinema film showings.
Churches – West Kirk and Our Lady and St Bridgets RC Church	Being aware of and working with West Kirk to develop their Hall offering, ensuring no competition but offering a different or larger space for rentals of social gatherings. Churches may also want space to hold bible groups or church group discussions in a comfortable community setting.
West Calder History Group	Key part of this project will be heritage and the History Group is well respected amongst stakeholders. This presents opportunities to use the knowledge and resources already gathered and harness the enthusiasm for local heritage from group members and the general public in everything that is to be offered from Society Place.

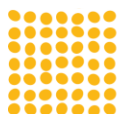


7.5 Managing Risk

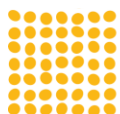
The risks associated with this project include securing a large amount of funding, attracting private investment, working with partners, provision of several different services and activities from Society Place and ensuring sustainability.

These are shown in the risk register below. These will be managed through the project steering group who will review these on a regular basis throughout the development and delivery process.

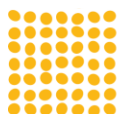
Risk	Impact	Probability	Existing Controls	Action Required	Lead Responsibility
Funding					
Difficulty securing match funding	High	Medium	Strong funding strategy and personal contact building relationships with key funders; strong track record in funding	Variation of funds Continue to develop relationships with funders	Board and Trust Manager
Refurbishment costs higher than expected	Medium	Low	High spec costings with contingency and room for value engineering. Conservative cash flow projection and business plan estimate with contingency;	Get competitive quotes See cost savings Phase fit out costs during construction Allow for contingencies in cashflow	Design team and Board; Trust Manager
Additional Costs of Phase 1 Stables Plan when agreed is high	Med	Med	Large contingency in design costs.	Detailed and costed temporary plan and long term plan allowing for demolition	Design team; Trust Manager



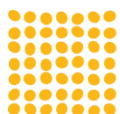
Risk	Impact	Probability	Existing Controls	Action Required	Lead Responsibility
Cost of moving/adapting Sub-station high	Low	High	Alternative design options	Clarify costs	Design Team; Trust manager
Capital Costs Higher than expected following tenders for refurbishment	High	Medium	10% contingency and additional potential savings	Clever cost savings by design team Ensure contingency is adequate Additional funding if possible	Board and design team; Trust Manager
Difficulty getting revenue funding	High	Low	Clear outcomes; evidence of need; strong track record of securing funding Good fit of activities with funders priorities Access to own funding Strong relationships Partnerships	Approach a mix of funders; clearly demonstrated outcomes	Board; Trust Manager
Sustainability					
Low demand for activities – impact of BREXIT on disposable income and visitor numbers to West Lothian	High	Low	Building awareness; involving the community; consultation; market research; good links with partners that could refer	Strong marketing throughout; keep partners and stakeholders advised during build and as elements are open for business; ongoing social media and digital marketing plan; get reviews posted on TripAdvisor and similar sites	General Manager



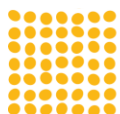
Risk	Impact	Probability	Existing Controls	Action Required	Lead Responsibility
Interim trading lower than anticipated?	High	High	Plans in place to trade from West Calder Community Centre during development and build phases to “pilot” activities	Ensure that we monitor customer response allowing for continuous improvement; ensure we communicate how we are getting on – maintain levels of awareness	Trust Manager; General Manager
Costs are not covered by income generated	High	Low	Cashflows prepared;	Realistic cashflow forecasting to ensure we understand the level of income we need to cover costs Review and renew cash-flows as project develops Need to input full build costs when we have these	General Manager; Trust Manager
Decreasing numbers of visitors/ customers	High	Low	People are aware of and support the project; good footfall and passing traffic; no real competition locally	Build up partnerships Ensure pricing is reasonable; similar will be part of marketing communications	General Manager; Trust Manager
Insufficient reserves to manage cashflow	High	Low	Building up trading income and ensuring efficient loan servicing; good level of reserves already; Reserves planned in current cash flow	Build reserves during initial years	Trust Manager; General Manager
Community Support					
Noise and nuisance levels during build phase; noise for customers arriving and leaving for local neighbours	Low	Medium	Good link with neighbours; involved in consultations so far	Monitor this and deal with it as it arises; may not be an issue	Trust Manager



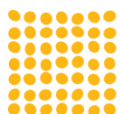
Risk	Impact	Probability	Existing Controls	Action Required	Lead Responsibility
Project not supported by local community	High	Low	Extensive community consultation involving everyone in the community with the chance to “have an opinion”	Community representatives on steering group to establish strong links into the community providing a sounding board, voice for any concerns to be raised as they arise	Trust Manager; General Manager Steering Group
Confusion within community about impact on West Calder Community Centre	Medium	Medium	Already working in partnership with Community Centre and engaging with community	Ensure we work with the Community Centre to advise people what's going on there; communicate differences between buildings	Trust Manager; Development Officers
Community Asset Transfer not successful	High	Low	Good links and positive discussions relating to asset transfer with Council	Maintain strong relationship and links with Council reps; submit formal CAT application April 2019	Trust Manager
Build Phase					
Maintaining security on site, both before and during build	High	Medium	Discussions will be ongoing with West Lothian Council clarify maintenance responsibilities during asset transfer phase	Arrange on-site security and public liability insurance during period between transfer of title and securing capital funding and build phase.	Trust Manager, Project Co-ordinator
Build phase over runs	Med	Med	Engaged experienced design team to develop schedule and oversee tender phase	Employ an experienced Project Manager to oversee construction and act as a main point of contact between contractors, board and steering group.	Trust Manager; Design team



Risk	Impact	Probability	Existing Controls	Action Required	Lead Responsibility
Complications during build – proximity to railway line and neighbouring houses in Gloag Place	High	Medium	Structural Survey reports have not yet highlighted an issue with this and already in discussion with both Network Rail, neighbours and Scottish Power	Continue to get solid surveys carried out; work closely with design team	Trust Manager; Project Co-ordinator
Lack of parking	High	Medium	Already discussing options; maximising space available in Courtyard area surrounding building	Develop alternative options for parking nearby (Community Centre and Business Centre); clear information on public transport alternatives; negotiate discounted rates with taxi firms to local train stations	Trust Manager; Project Co-ordinator
Impact of traffic management issues from Main Street	High	Medium	Community Council currently considering traffic calming and management measures	Continue discussions with Council to be aware of measures;	Trust Manager; Project Co-ordinator
Resources					
Getting the wrong General Manager (without the right skills)	High	Medium	Job description will be in Business Plan; experience of Trust Manager in the hospitality industry knowledge about skills and personality type needed	Write detailed person specification; recruitment process and interview panel; probationary period of 3 months; ongoing training plan and appraisal system from year 1; strong line management by Trust Manager	Board; Trust Manager
Difficulty recruiting volunteers	Medium	Low	The community supports WC&HCDT; we feel confident we'll get help from local people already interested in the project; robust volunteer processes and strategy	Continued communication with residents offering opportunities to volunteer as required	Board; Trust Manager; General Manager



Risk	Impact	Probability	Existing Controls	Action Required	Lead Responsibility
			in place; currently employ a volunteer coordinator		
Loss of Key Personnel, Volunteers and Board	High	Medium	Good terms and conditions for volunteers and clear CPD for staff	Write a succession plan Good terms and conditions for future staff Continued CPD for staff and board	Board; Trust Manager
Controlling large space with small number of staff	High	Low	Space is being designed to be efficient and easy access; learning from case studies	Consider opening times of spaces; shift patterns; core staff team on rota; use of volunteers on rota	General Manager



8. Managing Finances

8.1 Capital Development Costs

The project will require refurbishing the building to a high standard in order for us to attract locals, visitors and paying customers.

In order to fully establish final capital costs, more work will be needed during our development stage to employ an architect-led design team. Fully costed designs are shown in the Stage 2 Cost Plan Report prepared by Brown & Wallace dated August 2018. The synopsis of the cost estimate is summarised below:

Construction Costs	£	3,208,000
Project Team Fees	£	504,200
Development Costs	£	99,035
Risk Allowance	£	371,220
Inflation	£	208,198
VAT		Excluded
	£	4,390,653

At this stage, this very early cost table has been produced, but will need to be updated:

Item	Projected Cost
<i>Development Costs</i>	
Purchase price	£ To be confirmed
Technical Fees – architect, QS, structural engineer. M&E	£504,200
<i>Capital Costs</i>	
Capital Development	£3,208,000
<i>Other Development Costs - Site investigations - asbestos; engineers; planning, tests, surveys, utility search, bat survey etc. (all shown in Appendix 1 of the Stage 2 Cost Plan Report)</i>	99,033
Risk Allowance estimate (contingencies)	371,220
Inflation estimate	208,198
VAT not estimated at this stage	
Total Project Cost (excl VAT)	£4,390,652
Legal Fees (conveyancing)	£4,000
Development Worker	£30,000p.a.



8.2 Capital Funding

With increasing pressures on capital funding for community projects across Scotland, there is a need for caution in approaching fundraising for Society Place. WC&HCDT will need to continue discussions with funders to gauge the likelihood of certain funds and this will be done with the Project Co-ordinator during this development phase.

Funder	Details & Requirements	Amount Available	Comments
<i>Likely Targets</i>			
National Lottery Heritage Fund	<p>3 stage application process:</p> <p>Expression of interest – followed by invitation to apply</p> <p>Stage 1 application – application for development grant. Maximum of 2-year development phase</p> <p>Stage 2 application – application for delivery grant</p>	Up to £5million	Formal expression of interest currently under consideration Both stage 1 and 2 are competitive and a development grant award does not guarantee a stage 2 award
Robertson Trust		£50,000	Getting more competitive
Garfield Weston Foundation	Apply online for grants up to £100k. For Major grants over £100k a one page project summary should be submitted first	Regular grants up to £100,000 but can apply for more through Major Grants	Supports a broad range of charities including community projects and museum and heritage
Regeneration Capital Grants Scheme	<p>Need to be sponsored by the council</p> <p>Annual competition. 2 stage application process. Deadlines for 2019/20 to be confirmed but usually stage 1 - June stage 2 - October Decisions in January</p>	No maximum but likely £1 – £2m	Agreement to propose to WLC executive. Conversations with Scot Gov at civil servant and Ministerial levels.
National Lottery Community Fund - Community Assets	<p>One stage application but with an initial sifting process which determines invitation to apply.</p> <p>Programme is due to</p>	Up to £1m	Demand is high and likely to increase as closure approaches. The heritage focus means they would not be a main funder. However, a modest request (c£250k) with other funding secured could have potential. Would need to



	close to new enquiries in October 2019, with final deadline for full applications in March 2020		demonstrate strong community element Currently at enquiries stage
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8.4 Transitional Trading

We recognise the important of continuing to raise awareness of the development of Society Place and to pilot activities and services we plan to offer allowing us to test demand and levels of customer feedback allowing us to offer products that people want.

Our first stage will be working at the Café in West Calder Community Centre. We will work with West Lothian College to provide trainees/students working in the community café at the Community Centre, both in the kitchen and front of house. The offering will build up to a pop up bistro on a regular basis at the Community Centre, moving into Society Place to increase opening hours and expand the menu.



We will also offer a Heritage Display in the main lounge of West Calder Community Centre. Our existing Volunteer Co-ordinator and Events Coordinator will secure Museum status for WC&HCDT by working with West Lothian Council's Museums Officer and arrange displays and exhibitions for the Community Centre, aiming to develop the collections with a view to launching the Museum in Society Place in line with what people want to visit and learn about.

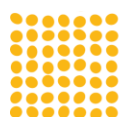
8.3 Ongoing Financial Modelling

In order to stay sustainable, Society Place will operate commercially, securing sales through weddings and catering, entrance fees, event space bookings, the shop, café and bistro. Key to this will be strong marketing and branding, strong partnerships with other local providers, and a highly capable central member of staff. Within this commercial context the project will still achieve our social outcomes as shown in section 2.

As explained in sections above the, initial concept of the project offerings have developed over a period of time. So to, have the financial models. Cash flows have been developed during the project development and have been regularly amended to reflect changes in the plan. The initial purpose of these is to check overall viability of the concept as it developed and they should be considered working documents.

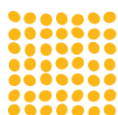
For example a detailed cashflow forecast was developed to test the viability of the model of the restaurant being delivered by a partner/tenant and the income therefore shown as a rental income. Likewise it also showed regular rental income from the brewery element.

More current forecasts focus on the model with the Hand's-on Cooperative Museum being the "visitor draw" and have modelled income accordingly.



There are still elements of this to be detailed as part of the next development phase, the next stage of detailed financial forecasting will take place in April and May 2019 to inform both the community asset transfer process and for applications to the main funders.

Current cash flow model is available as an appendix with the ultimate aim being sustainability over a five year period.



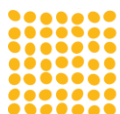
8.4 Ongoing Revenue and Project Funding

Some of our heritage projects may seek specific project funding and we will need revenue funding to help us in the first couple of years, to pay for key members of staff (see staffing above). These funders will vary depending on the beneficiary group.

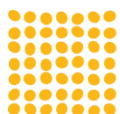
In order to be sustainable, WC&HCDT will undertake a full cost recovery exercise for each project or income strand it undertakes. For the purposes of this development plan we refer to projects being the different strands such as museum, shop, café/bistro and event space. Each project will need to cover a percentage of central costs.

Revenue Funders

Funder	Type of Fund	Details	Funds Available
Windfarm monies	Revenue	May be able to allocate some of these monies to revenue costs for Society Place in view of community and regeneration benefit	Up to £50,000
Barcapel Foundation	Capital and Revenue	Heritage, Youth and Health are their three priority areas – heritage is focused on built environment and cultural heritage (predominantly literature and art)	Up to £10,000
Garfield Weston Foundation	Capital, Revenue and Project	Funds museums and heritage	Regular grants (below £100,000) but can fund much higher
Charles Hayward Foundation Heritage & Conservation - Main Grants	Capital	Funding priorities include Heritage and Conservation	Up to £50,000
Scotmid and The Cooperative	Unknown	Potential targets given the history of the building and plans to develop a heritage centre focusing on cooperative history	To be negotiated
Private Investment	Unknown	Potential to leverage private investment depending on the management model – see above	To be negotiated
Small to medium sized funds	Unknown	Various application routes	Target £250,000



that can be brought together into a funding strategy such as; Bellsie Charitable Trust No 1 The Turtleton Charitable Trust Headly Trust Scott Fund Scottish Power Foundation Pilgrim Trust Wolfson Foundation MacRobert Trust			
Fundraising	Unrestricted	There is the potential to launch a crowdfunding appeal as well as undertake other forms of fundraising including community shares – perhaps an option to “buy a brick” or similar. We are currently receiving support from Community Shares Scotland and undertaking training in crowdfunding.	Unknown but the local population could potentially buy into this for local heritage offering while the national community of Cooperatives and Social Enterprises could buy into a national aspect.



8.5 VAT

We endeavour to minimise VAT liability and will commission an independent VAT assessment but at this stage, from early cashflows taken, there is no need to register for VAT so we have included all VAT on costs and have not factored VAT into the cash flow projection. If the organisation was keen not to have VAT liability, it is possible to opt to tax voluntarily. This will allow the project to reclaim some or all of the VAT, but will impact on the long term sustainability.

We will seek a formal VAT assessment at some stage during the development phases to provide us with expert guidance on this.

8.6 Next Steps

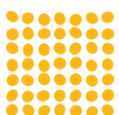
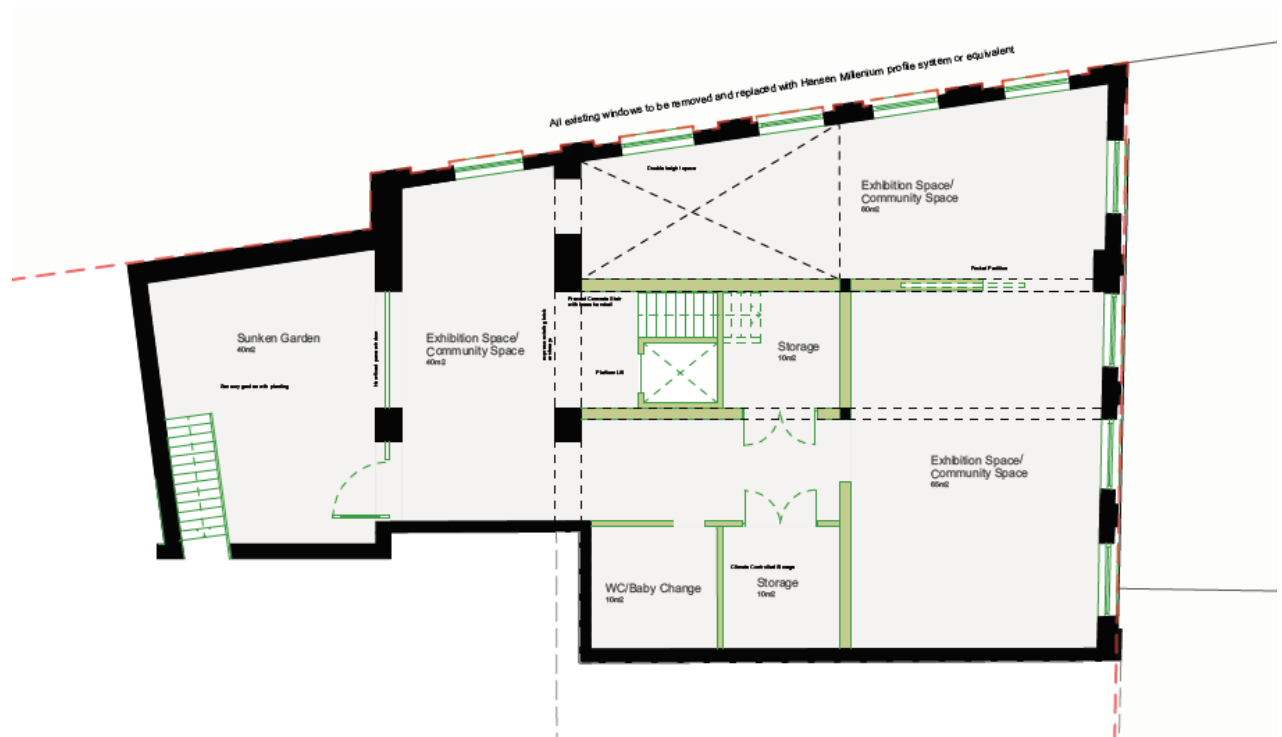
In taking forward our plans for Society Place, we have identified the key next steps we need to take.:

Within 6 months	<p>Progress funding applications – maintain discussions with main funders and submit first stage applications in line with funding deadlines</p> <p>Develop building designs in relation to developing partnerships (particularly regarding community, ASD and ASN spaces)</p> <p>Develop material concept of “hands-on” museum</p> <p>Carry out further work on business plans and financial models ahead of funded development phase</p> <p>Complete Asset transfer process with West Lothian Council</p> <p>Secure development funding by September 2019</p>
6-12 months	<p>Agree work plan for development phase with consultants (design team and business planning team)</p> <p>Recruitment/appointment of Development Officer to oversee development phase</p> <p>Proceed to RIBA Stage 3 and apply for planning consent</p> <p>Submit funding applications for capital delivery phase</p>
12 months +	<p>Secure full funding package</p> <p>Complete transfer of title</p> <p>Appoint Project Manager</p> <p>Start build phase</p> <p>Review/update business plan</p>



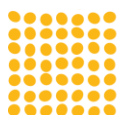
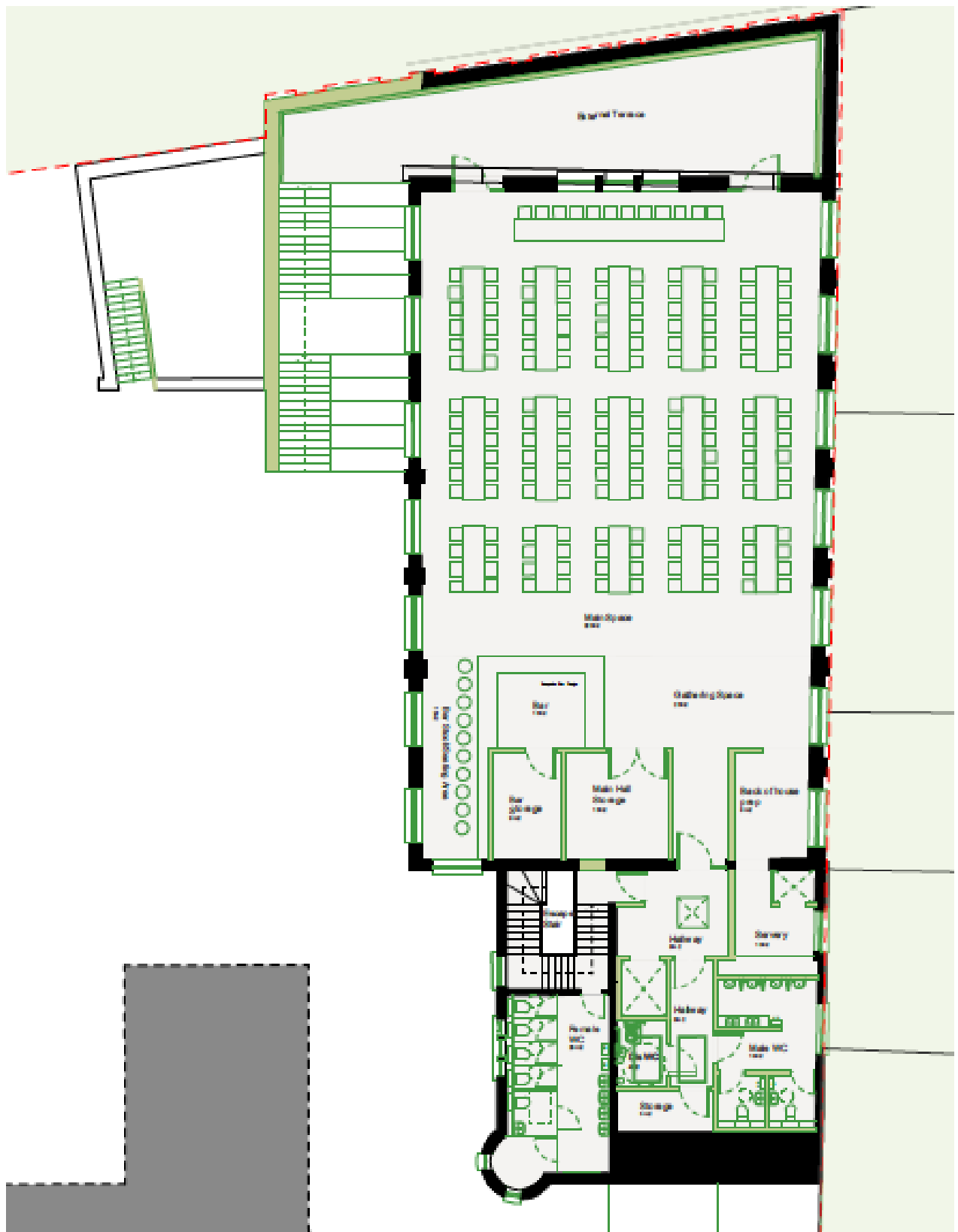
Appendix 1 – Architects' Floorplans

Basement Floorplan



A detailed architectural floor plan of the second floor. The plan shows various rooms including a Community Meeting Gallery, Exhibition Space, Reception Lobby, Office/Ten Triforium, and several smaller offices and storage areas. A large grey-shaded area on the left side of the plan indicates a section that has been removed or is under construction. The drawing uses black lines for walls and doors, green dashed lines for stairs and other structural elements, and red dashed lines for boundaries or future plans. Labels are placed throughout the plan to identify specific spaces and features.

First Floor Plan



Appendix 4: Index of Supporting Information Provided

Doc Ref	Date	Title	Author	Description
A	2013	West Calder & Harburn Community Action Plan 2013-2018	Small Town and Rural Development Group, Coalfield Development Trust.	Community Action Plan initiated by West Calder and Harburn Community Council , delivered by Coalfield Regeneration Trust and STAR Development Group as part of the Community Futures Initiative. Developed from detailed engagement and consultation with the local community and identifying a vision, aims, objectives and actions for the community and its local organisations. Creating a Community Development Trust was a specific action as are several aims that the Society Place project is designed to fulfil. The Trust adopted this as its guiding document.
B	2013	WC&HCDT Memorandum of Articles	STAR Development Group	Governing document of West Calder and Harburn Community Development Trust
C	2014	Design Study	Collective Architecture Ltd	A report based on community consultation which sets out a series of potential projects based on the Community Action Plan. Redevelopment of the Workspace (Coop Bakery) Building is detailed and ranked along with others.
D	2018	WC&HCDT Annual Report 2017/18	HM Moore Accounting	Annual accounts as submitted to Companies House and OSCR
E	2017	WC&HCDT Annual Report 2016/17	HM Moore Accounting	Annual accounts as submitted to Companies House and OSCR
F	2016	WC&HCDT Annual Report 2015/16	HM Moore Accounting	Annual accounts as submitted to Companies House and OSCR
G	2018	WC&HCDT Annual Review 2017/18	WC&HCDT	The Trusts Annual Review
H	2017	WC&HCDT Annual Review 2016/17	WC&HCDT	The Trusts Annual Review
I	2017	Architects Stage One Report	Collective Architecture Ltd	A report focusing on the wider and immediate context of the site, historical significance of the site and buildings including local history and heritage, existing photographic documentation and an existing buildings drawing exercise to include plans and contextual sections and elevations. (This report references Documents J,K,L,M,N & O as appendices)

J	2017	Building Inspection Report Main Bakery Building	Brown and Wallace Ltd	Building Surveyor's inspection report on the general state of repair and condition of the main bakery building. The primary aim of the inspection and report is to provide a clear commentary on the condition of the building fabric, structure and advise on the implications of refurbishment and re-occupation.
K	2017	Building Inspection Report Stables Building	Brown and Wallace Ltd	Building Surveyor's inspection report on the general state of repair and condition of the stables building. The primary aim of the inspection and report is to provide a clear commentary on the condition of the building fabric, structure and advise on the implications of refurbishment and re-occupation.
L	2017	Building Inspection Report Substation	Brown and Wallace Ltd	Building Surveyor's inspection report on the general state of repair and condition of the Sub-Station building. The primary aim of the inspection and report is to provide a clear commentary on the condition of the building fabric, structure and advise on the implications of refurbishment and re-occupation.
M	2017	Structural Condition Survey	Elliot and Co Ltd	Non-intrusive visual survey of structural condition.
N	2017	Preliminary Cost Plan Report	Brown and Wallace Ltd	The estimated construction costs for the Fabric and Structural Repair works for the entire site. The report also includes the estimated development costs for a series of demolition options.
O	2018	Research, Options and Feasibility Report	Community Enterprise Ltd	A report documenting the research undertaken by Community Enterprise to understand what the community needs are within West Calder and Harburn and how these could be met by developing spaces and facilities that will transform West Calder into a 'destination'. Includes results of a community survey outlining results of condition of building and gauging community appetite for progressing Community Asset Transfer process and gathering opinion and ideas as to use; an options appraisal of facilities and services; a physical options appraisal (see also Document Q architects report).
P	2018	Research, Options and Feasibility Report – Executive Summary	Community Enterprise Ltd	Executive summary of the above

Q	2019	Architects Design Development Report	Collective Architecture Ltd	Study documenting the design development following feasibility research and options appraisal (Document O) leading to current costed design. This document references Documents P, R and S and includes a summary of Document I and its appendices.
R	2018	Feasibility Phase 2 Cost Report	Brown and Wallace Ltd	Quantity Surveyor's costings for the designs developed in Document Q. This forms the basis for our current funding aims. Referred to in Documents Q and S.
S	2018	Business and Development Plan	Community Enterprise Ltd	Document detailing overall business plan of project and approach to ongoing development
T	2019	Marked Site Plan	WC&HCDT	Site plan showing boundary of property in asset transfer request
U	2019	Cash Flow Forecast	Community Enterprise Ltd	Working Document Cash Flow Forecast for project subject to development of detailed business plans
V	2019	Strategic Alignment Matrix	WC&HCDT	Document setting out how the Society Place project aligns with local and national priorities and outcomes
W	2019	Funding Strategy Timeline	WC&HCDT	Document setting out the funding timeline for the main funding strategy
X	1984	Copy Deed 1979, 1982 and 1984	Registers of Scotland	Copy Deed of transfer of title of land from Cooperative to West Calder Workspace including plan marked up as T
Y	2018	Good Connections Handbook	WC&CDT	Document developed by WC&HCDT detailing approach to volunteering, health and wellbeing and access to support and opportunity which will be the model for the approach at Society Place
Z	2017	Collective Architecture Initial Tender	Collective Architecture Ltd	Design teams initial tender for feasibility stage detailing the teams experience in delivering complex and ambitious projects
AA	2017	Community Enterprise Initial Tender	Community Enterprise Ltd	Community engagement and project development consultants initial tender for feasibility stage detailing their expertise and experience in developing and supporting ambitious community led projects

APPENDIX 5: COMMUNITY ASSET TRANSFER OFFICER BOARD SCORECARD**COMMUNITY ASSET TRANSFER OFFICER BOARD: SCORECARD**

Date of Board meeting: 9 December 2019

Community Transfer Body: West Calder and Harburn Community Development Trust

Subject Property: Former West Calder Workspace, Society Place, West Calder, EH55 8SA

Table 1a: Framework for Evaluation of Community Asset Transfer Requests

Theme	Summary	Information Required	Has evidence been provided? (Y/N)	Summarise that evidence	Evidence-based score Lowest = 0 Highest = 10
1. Vision and Leadership	An organisation will have in place a clear vision and plan for what it will do to contribute to the delivery of improved local and/or national outcomes. This may be linked to one or more local or national priorities.	A clear plan for achieving the intended outcomes, ideally showing links to local or national priorities. Members of the community transfer body would also show that they have the relevant skills and experience to deliver the intended objectives.	Y	WCHCDT have a clear vision of what their project is and the outcomes that it would produce. Based upon the evidence provided however, the Board is not convinced that those outcomes absolutely reflect the community's stated priorities. In terms of the Additional Supported Needs facilities, detail is lacking and these may duplicate planned WLC facilities.	6

Theme	Summary	Information Required	Has evidence been provided? (Y/N)	Summarise that evidence	Evidence-based score Lowest = 0 Highest = 10
2. Effective Partnerships	An organisation will show how it, and its partnerships, provides a collaborative approach to the challenges that communities face.	The detail of any partnerships in place to help ensure successful delivery of the intended benefits. Community support is vital and can be shown through a variety of metrics such as surveys, consultations or ballots.	Y	WCHCDT has engaged with its community and whilst the evidence provided is limited, it does exist. It is clear that the group are engaged with its community. There is little evidence however that they have engaged or propose to work in partnership with either the Co-op or WLC in terms of the local history museum or Additional Special Needs facilities respectively.	5
3. Governance and Accountability	An organisation will demonstrate structures, policies and leadership behaviours that support the application of good standards of governance and accountability.	An outline to illustrate that the appropriate structures and policies are in place to help ensure success in the longer-term.	Y	WCHCDT are a well organised, structured and well-governed organisation with robust processes and procedures in place. The Board's score reflects that position.	7

Theme	Summary	Information Required	Has evidence been provided? (Y/N)	Summarise that evidence	Evidence-based score Lowest = 0 Highest = 10
4. Use of Resources	An organisation will show how its effective management of all resources (including staff, assets, and information) is contributing to the delivery of specific outcomes, highlighted in the national outcomes.	Explain how the body's current and future resources will be used as part of a medium to long term plan (5-10 years). This could include the numbers of employees or volunteers and the maintenance of any asset. This could also include the funding requirements of the group and the sources of funding already in place.	Y	In light of the fact that WCHCDT has none of the required £4.20 million funding in place to deliver the project and one of their principal anticipated funders refused their funding application in June 2019, the Board agreed a low score for this area. Shortcomings in their revenue projections were also noted.	1
5. Performance Management	An organisation will ensure that robust arrangements are in place to monitor the achievement of its desired outcomes as well as any reporting arrangements.	Outline the way in which a community transfer body will be able to monitor the achievement of its objectives, whether that be recording volunteers time or the amount of benefit achieved as part of the overarching vision. To demonstrate openness and transparency it will be important to report performance to the community.	Y	WCHCDT have demonstrated what their anticipated outcomes are, but have provided limited detail as to how these would be monitored and measured going forward. It is recognised that the organisation has the capacity to develop those measures going forward.	5

Theme	Summary	Information Required	Has evidence been provided? (Y/N)	Summarise that evidence	Evidence-based score Lowest = 0 Highest = 10
6. Sustainability	An organisation will demonstrate an effective use of resources in the short-term and an informed prioritisation of the use of resources in the longer-term in order to contribute to sustainable development. The goal of Sustainable Development is to enable all people throughout the world to satisfy their basic needs and enjoy a better quality of life without compromising the quality of life of future generations.	<p>There are five broad principles of sustainability:</p> <ul style="list-style-type: none"> • promoting good governance; • living within environmental limits; • achieving a sustainable economy; • ensuring a stronger healthier society; and using sound science responsibly. <p>A community transfer body could demonstrate how its future funding or self-financing arrangements are to be achieved. Any proposal could also include any positive impact on the natural environment.</p>	Y	The submission was considered to be weak in this area, with limited detail in terms of sustainability. In particular, it was considered that there were significant and key failings in their revenue projections, which raised concerns over the long-term financial sustainability of the project.	3

Theme	Summary	Information Required	Has evidence been provided? (Y/N)	Summarise that evidence	Evidence-based score Lowest = 0 Highest = 10
7. Equality	An organisation will demonstrate that consideration of equality issues is embedded in its vision and strategic direction and throughout all of its work.	The transfer body should establish that the different groups within the community have had their different needs taken into account. Request should include where a proposal may be reducing inequalities of outcome from socio-economic disadvantage.	Y	Whilst there was limited dedicated evidence in terms of equality (e.g. an Equality Impact Assessment), it is clear that the organisation and indeed the project has equality embedded in its founding principles.	7
8. Alignment with council objectives	The organisation will demonstrate what its proposed outcomes are and how these align with the council's own stated priorities.	The community transfer body will identify each of the outcomes it aims to deliver from the project and will demonstrate how these outcomes align with the councils stated priorities (referencing such documents as the Corporate Plan, Single Outcome Agreement, Local Outcome Improvement Plans, management plans and corporate strategies).	Y	It is recognised that the aims of this organisation do reflect a number of the council's stated corporate objectives and the project does seek to deliver objectives that the council seeks to promote.	6

TOTAL SCORE (out of a possible maximum of 80):

40 points

Table 1b: Evaluation of the strength of the case being made

Evidence	Overview
Very strong (a score of 70 or above)	Governance and financial arrangements are strong and sustainable. Best Value characteristics are evidenced and contained throughout the overall approach. Related projected benefits are very robust and demonstrate value for money: suitability, effectiveness, prudence, quality, value and the avoidance of error and other waste.
Strong (a score of 60 to 69)	Governance and financial arrangements are sound and sustainable. Best Value characteristics are in evidence in the proposal. Related projected benefits are demonstrated well and represent value for money.
Moderate (a score of 50 to 59)	Governance and financial arrangements are in place and acceptable. Best Value characteristics have been considered as part of the proposal. Related projected benefits are acceptable and could lead to value for money.
Weak (a score of 40 to 49)	Governance and financial arrangements are weak. Best Value characteristics are not well demonstrated in the proposal. Related projected benefits are not based on robust information and demonstrate questionable value for money.
Poor (a score of 39 or less)	Governance and financial arrangements are poor. There is little evidence of Best Value characteristics in the proposal. Related projected benefits are ill defined and/or unrealistic and do not demonstrate value for money.

Commentary

The Board recognised WCHCDT's strengths and capacities as an organisation and acknowledged the significant amount of preparatory work that they had undertaken in advance of submitting this community asset transfer request.

Based upon the information provided however, the Board was not convinced that WCHCDT had adequately demonstrated that this ambitious project is one that meets the stated priorities of their community or that this is how their community would choose to spend a budget of £4.20 million given the chance. Both the village action plan and the design study point to the community identifying slightly different priorities (e.g. the provision of new sports facilities and the redevelopment of either Union Square or Main Street).

WCHCDT themselves state in their submission that this is a "high risk project". The main area of concern for the Board was deliverability and financial sustainability. WCHCDT have none of the required £4.20 million funding in place and were rejected by one of their anticipated major funders (the Regeneration Capital Grant Fund) at Stage 1 of the application process in September of this year. They have no meaningful commitment from their other proposed major funder (National Heritage) and appetite for their proposed community share issue is speculative. Their revenue projections for future years were also considered to be lacking in detail and unsubstantiated.

It was also noted that the project's construction costs are likely to have risen and will continue to rise with the passage of time, pushing that £4.20 million figure even higher. It was considered that their project contingency figure was inadequate given the project's "high risk" status and location immediately adjacent to a major, electrified, arterial railway line.

There is no evidence of meaningful engagement with the local planning authority, nor with West Lothian Council in terms of the proposed Additional Special Needs facilities, which may duplicate approved capital projects that the council themselves will be delivering going forward. Likewise, there is no reference to detailed engagement with Network Rail's Asset Protection Team on the practicalities and significant risks involved in undertaking a major redevelopment project such as this immediately next to a major, electrified arterial railway line.

Conclusion

It is the duty of the Board to weigh up WCHCDT's proposal against other alternative options. The Board considered that the council has provided sufficient time for WCHCDT to develop and deliver this project and in supporting the recent (unsuccessful) funding application to the Regeneration Capital Grant Fund. WCHCDT have not, thus far, secured any funding and, using their own timeline, it would be January 2021 at the very earliest before their next round of funding applications would be determined, with no guarantee of success.

In the knowledge that there are multiple confirmed commercial interests in this property and in the knowledge that the continuing deterioration of the buildings present a tangible risk both to public health and safety and to the public purse, the Board recommend that WCHCDT's asset transfer request be refused and that officers should proceed with alternative proposals for this property.

(END)

Appendix 6

Community Empowerment (Scotland) Act 2015: Section 82

Criteria for determining an asset transfer request

- 1) Section 82 of the Community Empowerment (Scotland) Act 2015 sets out the criteria for determining asset transfer request made by a community transfer body to a relevant authority.
- 2) The authority must decide whether to agree to or refuse the request.
- 3) In reaching its decision, the authority must take into consideration the following matters:
 - (a) The reasons for the request,
 - (b) Any other information provided in support of the request (whether such other information is contained in the request or otherwise provided),
 - (c) Whether agreeing to the request would be likely to promote or improve -
 - (i) Economic development,
 - (ii) Regeneration,
 - (iii) Public health,
 - (iv) Social wellbeing, or
 - (v) Environmental wellbeing,
 - (d) Whether agreeing to the request would be likely to reduce inequalities of outcome which result from socio-economic disadvantage,
 - (e) Any other benefits that might arise if the request were agreed to,
 - (f) Any benefits that might arise if the authority were to agree to or otherwise adopt an alternative proposal in respect of the land to which the request relates,
 - (g) How such benefits would compare to any benefits such as are mentioned in paragraphs (c) and (e),
 - (h) How any benefits such as are mentioned in paragraph (f) relate to other matters the authority considers relevant (including, in particular, the functions and purposes of the authority),
 - (i) Any obligations imposed on the authority, by or under any enactment or otherwise, that may prevent, restrict or otherwise affect its ability to agree to the request, and
 - (j) Such other matters (whether or not included in or arising out of the request) as the authority considers relevant.
- 4) The authority must exercise the function under subsection (2) in a manner which encourages equal opportunities and in particular the observance of the equal opportunity requirements.
- 5) The authority must agree to the request unless there are reasonable grounds for refusing it.
- 6) In subsection (3)(f), an “alternative proposal” includes:
 - (a) Another asset transfer request,
 - (b) A proposal made by the authority or any other person.

APPENDIX 7: SUGGESTED CONDITIONS IN THE EVENT OF COMMITTEE ACCEPTING THE COMMUNITY ASSET TRANSFER REQUEST

In the event of the Asset Transfer Committee accepting the community asset transfer request, it is recommended that the subsequent Decision Notice should include the following conditions:

1. The West Calder and Harburn Community Development Trust (WCHCDT) must provide the council with written confirmation by no later than 31 March 2021 that a minimum of £4.20 million in funding has been secured to deliver this project.
2. WCHCDT will apply for planning permission and/or any other necessary statutory consents required for this project by no later than 31 March 2020.
3. In the event of a title search presenting prohibitive title burdens relative to the transfer of this property from the council to WCHCDT, then the council shall be entitled to withdraw from the transaction and WCHCDT shall not be entitled to any recompense or compensation in relation to costs incurred.
4. By no later than 31 March 2020, WCHCDT shall provide evidence of the community benefit to be derived from this project, that community benefit being no less than the £100,000 market value of the subjects.
5. A first ranking standard security shall be granted over the subjects to protect the council's interests until such time as the full amount of community benefit has been shown to have been delivered.
6. Completion of the proposed community asset transfer shall be suspensive upon the forgoing conditions being satisfied. If any of these conditions are not satisfied then the council may withdraw from the transaction without recompense to WCHCDT and the asset transfer process will be agreed between the parties as being at an end.

(END)