



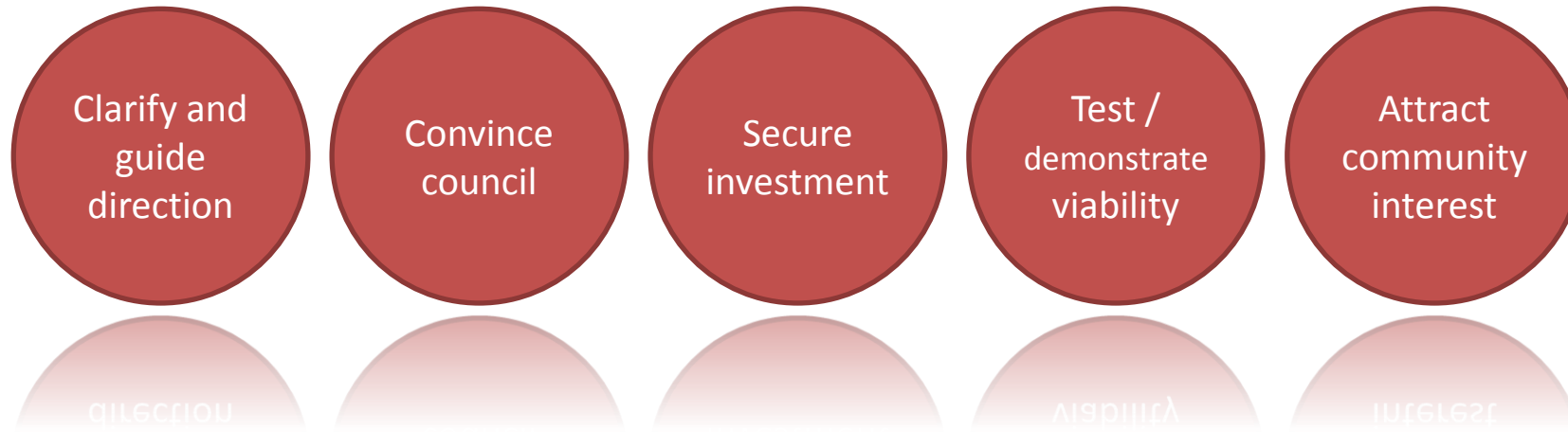
locality.org.uk

Prepping Recap Together

- Started process in June
- Go through some of head lines again – presentations and other documents with Jane and available
- Let me know if anything missed as we go along?

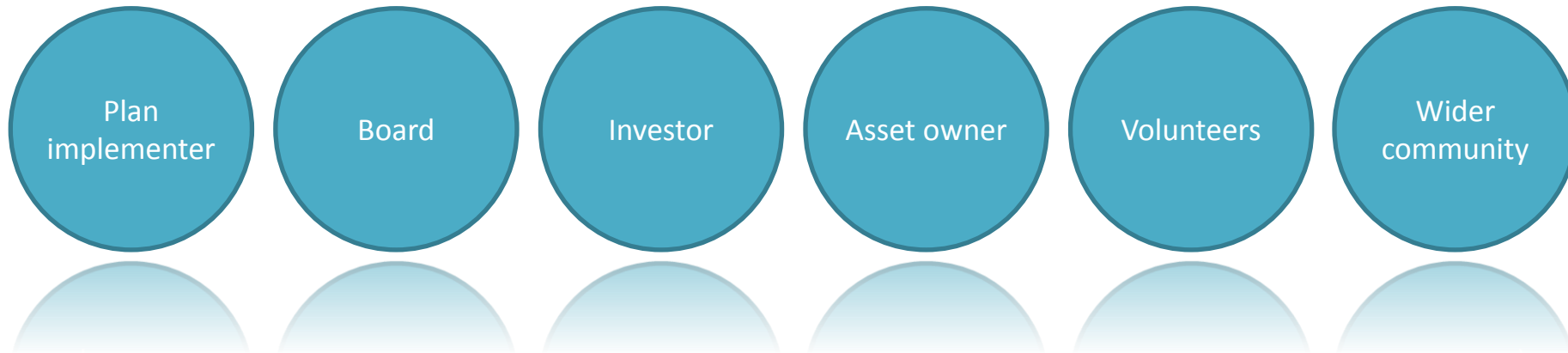
Suggestions

- Decide **purpose** of business plan
 - What do you hope it will achieve?



Suggestions

- Consider audience
 - who will read it?
 - What are they looking for?



Building Flexibility

- Can spaces be used in a number of ways for different user groups and needs?
- Can the spaces be changed?
- Is there potential to change spaces/uses quite easily in the future?
- Has the refurbishment made it possible to support a broader spectrum of user groups?
- Storage

Can your building outlive your business plan

Adapt to tenants and client needs

Enterprise

- Does the building meet the needs identified in the business plan?
- Has the design of the building / refurbishment created new opportunities for enterprise within the facility?
- Has the refurbished building retained old user groups?
- Is the refurbished building attracting new user groups?

Think through a day in the life of operating your business in practical terms. Have your business plan in mind when considering design.

Management and Viability

- Understand likely management and maintenance costs at planning stage.
- Staffing needs
- Maintenance and management tasks need to be designated to suitable individuals.
- Decision making responsibility needs to be clear

Facilities Management

Activity	Tasks
Strategic Facilities Management	<ul style="list-style-type: none">• Property Policies: Who can use, on what terms.• Capital Strategy: Investment in building• Corporate Landlord Responsibilities: Insurance, Compliance
Site Maintenance and Management	<ul style="list-style-type: none">• Officer in charge: on site Fire and H&S, vulnerable people• Grounds maintenance• Security• Health and Safety• Parking
Building Maintenance	<ul style="list-style-type: none">• Repairs• Cyclical preventative planned maintenance

Who's Responsible?

- Trustees
- Staff
- Volunteers
- Outsourced
- Collaborative procurement
- In Kind

Facilities Management

Activity	Tasks
User/Customer Service	<ul style="list-style-type: none">• Reception• Tenant/user liaison
Contractor/Staff/Volunteer Management	<ul style="list-style-type: none">• Negotiating Contracts• Cleaning• Catering• Grounds Maintenance• Security• Repairs Grounds maintenance• Repairs

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Insurance

- **Employers liability** is a legal requirement
- **Public liability** is essential to prevent undue risk to charity and potentially personal liability of trustees.
- **Buildings and Contents** should also be regarded as essential.
- Who to provide this -through GBC for better deal?

Agreements with Users

- Essential to protect interest of you as responsible managers.
- Manage expectations and clarify terms
 - Lease
 - Licence
 - Charging policy and Hire Agreement (rules of hire)
- Service Charges

How much does it cost to run a building?

- The Building Calculator uses Whole Life Costing methodology to help you understand and plan ahead for your operating and maintenance costs.

BUILDING  CALCULATOR

www.buildingcalculator.org.uk



Exclusive Free Use for COMA Community Partners

Visit www.buildingcalculator.org.uk

1) Register and complete data entry

2) Email mick.mcgrath@locality.org.uk with details

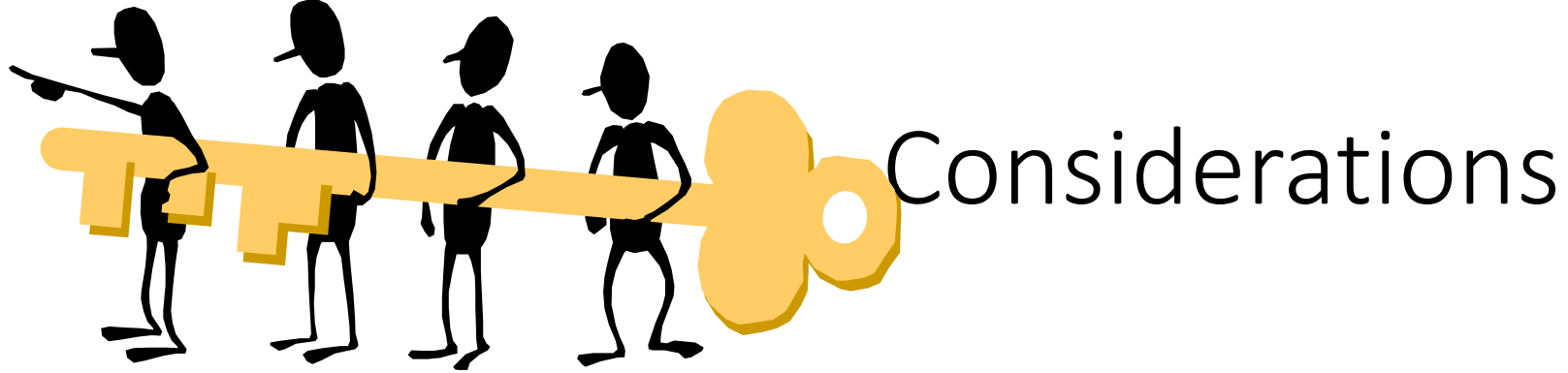
3) We will email you report

Legal

- Strongly recommended 99 year lease
- A flexible lease is key - opportunities to sub lease, develop new income streams
- Be clear on legal structure and benefits such as business rate relief
- Clear on the building blocks of taking a lease - survey, due diligence - title, searches, enquiries, heads of terms, negotiate documents

Role of Community Anchors

1. Providing services and act as gateway to helping people access services
2. Bringing in money to area – applying and earning
3. Provide a voice for local people – engaged, advice and support services, promote
4. Supporting other community organisations – capacity building
5. Strengthening community involvement – community development work, devolved models of service delivery



1. Taking Stock of Developing and maintaining support
2. Assembling relevant information on assets
3. Formulating transfer strategies
4. Assessing options for use
5. Developing and maintaining support for the project
6. Managing the risks
7. Agreeing terms
8. Building an effective organisation
9. Raising finance
10. Maintaining long term viability

Useful resources

- <http://www.localitybrokers.org.uk/>
- <http://www.buildingcalculator.org.uk/>

- To Have and to Hold
 - <http://locality.org.uk/resources/hold/>
- Making Buildings Work for Your Community
 - <http://locality.org.uk/resources/making-buildings-work-community/>
- Green Asset Guide
 - The <http://locality.org.uk/resources/green-asset-guide/>

