



The Langholm Initiative

www.langholminitiative.org.uk

SCIO: SC041085

BUSINESS PLAN 2022 ~ 2027



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1. Introduction

In the last business plan period and specifically in the last two years, the Langholm Initiative has succeeded in the face of an international crisis, in the form of a global pandemic and several national lockdowns to:

- grow its membership significantly;
- converted its legal structure from a registered charity and company limited by guarantee to a Scottish Charitable Incorporated Organisation (SCIO);
- raised £3.8 million to buy 5,200 acres of land from Buccleuch Estates and funding for staff to manage the development of the nature reserve;
- *commenced a fund raising campaign in order to purchase a further 5,300 acres of land from Buccleuch Estates;
- successfully delivered on the other community projects which align with its charitable purposes and objects;
- purchased the 'Kiosk' at the Kilngreen from Buccleuch Estates;
- raised funding for core work and for other organisations in Langholm, which were delivering services related to the Covid-19 pandemic;
- gain considerable publicity for its work both nationally and internationally;
- increased the number of full time employees and managed their welfare over a challenging period;
- reviewed and updated its internal policies and procedures;
- devised a fundraising strategy and business plan in order to ensure it is stronger as an organisation going forward.

These achievements are commendable and trustees, staff and volunteers have all contributed to this situation.

The Langholm Initiative has worked with the South of Scotland Enterprise, Community Land Scotland and other key partners in order to achieve a community land buyout in a period where most work came to a halt due to the global pandemic.

The organisation has created a subsidiary company; The Langholm Initiative Trading Company Ltd was established in order to manage the new Tarras Valley Nature Reserve community asset (hereinafter called TVNR™).

The Langholm Initiative has a strong and diverse board of Trustees and its future, as we come into a new financial and business plan period is looking positive.

This business plan should be regarded as a living document that is subject to an annual review of performance against targets and an update within the 5 year cycle.



Margaret Pool, Chair

8th March 2022

* **Feb '23 BP annual review** - the second purchase was completed on 4th Nov '22 – refer section 14 and Appendix 4 of this business plan.

2. History

The Langholm Initiative was initially established as a charity in 1994, to address the economic decline of the town of Langholm at a time when the main tweed making industries were closing down in the town.

A number of organisations entitled 'community initiatives' were enabled to be set up across Dumfries and Galloway and supported with core funding from Dumfries and Galloway Council for many years. This core funding ceased to be awarded some years ago. Although some of these other organisations still survive, many were unable to continue.

The Langholm Initiative has proved resilient over the years and has survived and overcome challenges. It worked through the foot and mouth epidemic in 2001 and has succeeded in working through the Covid-19 pandemic period.

It has a strong track record and a good reputation across the south of Scotland. It has strong links with other organisations as well as with public sector bodies.

Over the years The Langholm Initiative has supported other groups to take forward and develop schemes such as: a food festival, a walking festival and a women's group which enabled some women to set up their own businesses and which was able to deliver a project which enabled women 'far from the workplace' to get into training and work. Langholm Initiative has also participated in transnational projects with European partners.

The Langholm Initiative updated its constitution in 2020 and successfully converted its legal structure to a Scottish Charitable Incorporated Organisation (SCIO).

3. Vision

Our vision is that in five years' time Langholm Initiative will be at the heart of its community, have a strong board, and a good staff base with robust business processes in place. It will be recognised as a community change agent and will be taking forward and leading place-based community, economic and environmental development. It will be working on and have delivered projects that can demonstrate benefits to the community and help combat climate change, which are in line with its objects. It will be generating some of its income and increasing its financial sustainability. Through successful development of the TVNR™ the organisation will be an exemplar of 21st century community owned land management.

4. Values

We value our communities and offer a place-based, holistic approach to social/community, economic and environmental development.

We believe that trust, honesty, kindness and respect are critical to enabling us to deliver our best.

We respect and encourage the unique contribution of other organisations based in the community and recognise that there are different ways of working.

We work together by promoting positive, productive and proactive relationships and partnerships and believe that working together can enable us to deliver better outcomes for all.

We are clear about roles, responsibilities and expectations.

We strive to operate with professionalism and integrity and act in an honest and transparent way.

We are accountable for what we do and take responsibility for our actions.

We value, recognise, respect and celebrate our staff and volunteers.

We deliver what we say we will and do this in a flexible, open and positive manner.

We have a robust financial plan coupled with a board approved minimum reserve policy

We set clear expectations and strive to exceed them.

5. Objectives

The Langholm Initiative has the following objectives for this business plan period:

- Build upon our status as the community 'anchor organisation' to support the local economy and benefit our community.
- Proactively identify and deliver projects which will align with our charitable purposes and contribute to the health and well-being of our community.
- Build on our funding strategy and develop a robust business model which will support the economic sustainability of our organisation.
- To work in partnership all partner organisations in order to deliver the Langholm Community Plan, which has been agreed by the Community and supported by SOSE and Dumfries and Galloway Council.
- To ensure that the TVNR™ becomes profitable and economically sustainable within 3 to 5 years and becomes an asset for the whole community.
- Invest in our people (employees and volunteers) ensuring that we have the capacity to withstand shocks by ensuring we have robust continuity and succession planning in place.

6. Governance

As a Scottish Charitable Incorporated Organisation (SCIO) the Langholm Initiative has to abide by Scottish charitable law and report to the Office of the Scottish Charities Regulator (OSCR) annually. A SCIO is a legal form unique to Scotland and enables Langholm Initiative to enter into contracts, employ staff, incur debts, own property, sue and be sued. It also provides a high degree of protection against liability. Guidance for trustees and for managing SCIOs is given by OSCR. (see Appendix for further details)

7. Headlines

As of January 2022 the organisation has:

- A total income of *£4,310,650 (audited accounts for year ending March 2021);
- 8 Board members with a broad skill mix;
- 6 staff members;
- Approximately 90 volunteers;
- It has grown the membership to nearly 800 in 2021; includes community members, associate members and junior members; and
- A track record (as recognised by funders and third sector organisations) of delivering successful and award-winning projects.

One of the strengths of the organisation is its ability to be flexible and respond to local issues and seize opportunities to take forward local initiatives as they arise.

* **Feb '23 BP annual review** – see updated financials in Table 4 Section 23 iii).

8. Membership

The Langholm Initiative values its members as a body of people from whom it takes its mandate to operate. It has three kinds of membership: Ordinary members (ordinarily resident in the community), associate members, both locally and from other parts of the UK and further afield, and junior members. It has grown the membership significantly in 2020/21 mainly because of the Langholm Moor community buyout work, which has gained the organisation support both locally and from other parts of the country.

The organisation has also introduced a 'Friends of Langholm Initiative' category, which accommodates non-community people who, due to requirements of its Constitution are unable to register as associate members at this time.

Langholm Initiative aims to keep this membership engaged, informed and consulted. Langholm Initiative recognises that its membership is a body that it can draw on in the future for working groups, technical advice, for board members and volunteers.

9. Location

The Langholm Initiative office is currently located in an old mill building not far from the A7 and it has dedicated car parking, which is very useful. The Langholm Initiative will continue to review the suitability of its base over the next few years to ensure that where it's located continues to be fit for purpose. Although this is not a high street location, the office is housed on industrial land alongside small businesses in the town and it benefits from being able to keep in touch with them.

The Langholm Initiative is one of several community led and managed organisations. Each of these has a discrete purpose. They include organisations such as:

- The Buccleuch Centre;
- Langholm Playcare;
- Muckle Toon Media – The Eskdale & Liddesdale Advertiser;
- The Eskdale Foundation;
- The Langholm Day Centre for Older People;
- The Langholm Alliance; and
- The Xcel Project.

The Langholm Initiative aims to work in partnership with the other organisations in the community where collaboration is possible. It will work with The Langholm Alliance to support delivery of the Langholm Community Plan and participate in various working groups.

For the last few years the The Langholm Initiative has operated their tourism and community information service from the *Welcome to Langholm premises in the Market Place, however, like its office base this may change depending on circumstances.

The current premises provide exhibition and display space for local artists and makers from which the The Langholm Initiative earns a modest commission. Change of premises may mean alternative display space/area would have to be sought.

The Langholm Initiative recognises and appreciates the support from Ashley Bank Investments who own the *Welcome to Langholm premises.

*** Feb '23 BP annual review** - Welcome to Langholm project name changed to Langholm Information Hub in Feb '23.

10. Context

The Langholm Initiative has continued to operate during the financial years 2020/22 (Covid pandemic) and has supported staff through regular contact and by the use of furlough. Potential job losses, an economic downturn and competition for available grant funding have the potential to impact on the work of the organisation in the next few years.

Around Langholm there are changing physical landscapes with the loss of land from upland farming to forestry and windfarm developments and a proposal to build flood defences. The support for rural community projects post Brexit (post LEADER) from government is as yet unknown although the Scottish Government has stated it intends to create a similar fund.

Some of the items likely to impact on the work of the organisation and on Langholm going forward are:

- Scottish Government policies and funding related to land use, agriculture, forestry and renewable energy;
- Opportunities which arise post Brexit and post the Covid-19 pandemic;
- The recently created South of Scotland Enterprise with its remit of supporting community and economic development across the whole of the south of Scotland; <https://www.southofscotlandenterprise.com>
- The Borderlands Initiative;
- Regional land use planning development work is taking place in Scotland as part of the Scottish Government's land use strategy 2016-2021 and that might be something Langholm Initiative could get involved in going forward;
- Policies of Dumfries and Galloway Council including the Local Development Plan, the Economic Development Plan, Climate change plan and the flood prevention plan; and
- The work of the Langholm Alliance and the delivery of the Community Plan.

11. Communications and Marketing

The Langholm Initiative currently uses a range of media to keep its members, partners and the public informed about what it is doing including the following

- Social media – Facebook and Twitter – the Langholm Moor Community Buyout has had its own Facebook and Twitter accounts
- Newsletter
- Press releases
- Website www.langholminitiative.org.uk

The monthly newsletter is sent to the community newspaper.

Going forward the organisation could designate one board member or a volunteer to oversee public communications and marketing to ensure there are regular communications promoting the work that it does and to ensure it is co-ordinated. It is an essential and important way of engaging with members and the

community. It could also review its brand to ensure it is communicating the right image of the organisation.

A new website for Langholm was launched in 2020 to help market the area, which Langholm Initiative can input to: <https://www.welcometolangholm.co.uk>

The Langholm Initiative is hoping to create a short film, archiving the Langholm Moor buyout and the first steps in the creation of the Tarras Valley – this would include recorded interviews with those who have, and are living on the moor, those closely association with monitoring the wildlife, volunteers and the estate manager talking about the vision for the land.

Table 1: The Langholm Initiative on the internet and on social media

Digital Platform	Address
Websites	www.langholminitiative.org.uk
Twitter	@langholmonline
Facebook	www.facebook.com/langholminitiative
Community land buyout Facebook page	www.facebook.com/The-Langholm-Moor-Community-Buy-Out-Group

A new website for the TVNR™ will be established in 2022.

12. Projects

The Langholm Initiative’s work is mainly delivered through funded projects by the work of staff and volunteers. The organisation does not receive core funding but aims to take a proportionate management fee for projects to help cover administration and office costs.

At the time of writing in 2022 the organisation is delivering a mix of projects, which are at different stages (set out in Table 2) and which are in line with the organisation’s charitable purpose and objectives. These have the potential to benefit a wide range of people and sectors within the community.

In 2020 the Covid-19 pandemic meant that the organisation had to pause all of its projects for several months and furlough its staff. Staff then had to take time to rethink how to take forward project delivery in line with Covid-19 guidance. Funders were all sympathetic towards this course of action.

Table 2: The Langholm Initiative's projects as of January 2022

Project name	Details
Townfoot Sports Centre Redevelopment	Identifying how a previously privately run sports centre/swimming pool which is now closed can be redeveloped for community benefit.
Digital skills	Intergenerational project aimed at helping people develop digital skills.
Textiles Eskdale	The project celebrates and aims to regenerate the textile heritage of Langholm, which looking to the future for new opportunities.
Welcome to Langholm	The project provides a six day a week information service for visitors and locals. It also provides an exhibition space for locally based artists and makers.
Tarras Valley Nature Reserve	The ecological restoration and development of the nature reserve for the benefit of the community.
Inspiring Engagement in Nature	Nature based education and supporting engagement of volunteers with the nature reserve
Creative Digital Media	Make film and create online content with the aim of documenting the ecological restoration of the nature reserve.
CivTech Project	Work with partners to develop technological solutions, which will help landowners make informed land-use decisions and increase carbon capture.
Kilngreen Kiosk	Small premises overlooking the Langholm Kilngreen, a scenic and extremely popular stopping-place for visitors and locals alike, short-term rentals at the Kiosk offer a unique opportunity for small businesses to access a large volume of passing trade.

Set out within each project is a set of aims and outcomes which have to be achieved, have been agreed with funders and endorsed by the Board. Each project provides a project report, sometimes at the halfway point and always at the end of the project to funders.

The organisation works with other organisations in the region, in the South of Scotland and nationally.

Project funding comes from a wide range of sources, mainly from grants. The organisation has a fundraising strategy in place.

Project development comes about in a range of ways and can be driven by research – such as the digital skills project - availability of funding, ideas from staff or board members, community need or ideas gained from visiting, hearing about or partnering with other projects or simply in opportunistic ways. For example, the Townfoot sports centre work and the Langholm Moor community buyout are two projects that arrived 'out of the blue'. Both are large pieces of work but the organisation felt it was best placed within the town to take these on and believe that if they had not done so, they would not have happened.

In developing projects going forward, community engagement should be used if possible to ensure and be able to demonstrate which projects address community needs and aspirations. The Langholm Moor and the Townfoot sports centre projects have undertaken considerable community consultation work. The organisation could also hold workshops to look at project options around the sectors it wishes to work in. For example, a workshop bringing in staff, board members and volunteers might identify potential areas of work which the organisation could consider.

One approach to project development is as follows:

- Project team is set up 6 months prior to funding being required;
- Team consists of two Langholm Initiative board members, existing project manager (if it is a follow on or related project), office administrator, administrative assistant;
- If it is a follow on project or related to the existing one, the current project manager is only involved in the development of the project itself with the office administrator and finance officer developing the budget and potential funders, the board members oversee, guide and report back to the board; and
- If it is for a completely new project, the same process could be used without the existing project leader; however you might ask a community member who has an interest in the future project to join the project development team.
- There should be a process for Board approval for taking forward project development to ensure all new projects fit with the organisation's objects and charitable aims but this should not become overly bureaucratic nor should it stifle innovation. Staff should be allowed to be creative in bringing forward project proposals. The framework could simply be a flow chart which sets out how a project proposal is presented to the board and approved for development before being brought back for it to be agreed in more detail. The project lead would then seek funding for the project, keeping board members updated regularly on progress.

It is important that given the context in which the business plan is being prepared, there is built in flexibility to allow the organisation to take forward new projects to benefit the needs of the community.

Unemployment levels are likely to rise in the next year and incomes are threatened; the Langholm Initiative has a track record of supporting people into training, work and in signposting to other organisations for support. It also has a track record of helping to address poverty and ensuring people can get the support and guidance they need. This means it is well placed to develop projects that offer this kind of support.

With experience of asset acquisition gained through the initial Langholm Moor buyout the Langholm Initiative will take on further work to increase its assets.

13. Partnerships

Some of the partners the Langholm Initiative connects with are listed below. The organisation recognises that good partnership projects can bring benefits through the sharing of good practice and ideas. Two projects in recent times with partners in Eyemouth and Northumbria have demonstrated that and led to Langholm projects which have had positive impacts.

- **Statutory bodies:** Dumfries and Galloway Council, Scottish Natural Heritage, South of Scotland Enterprise, Langholm schools cluster, the NHS;
- **Networks:** The Development Trusts Association; Third Sector Dumfries and Galloway, Community Land Scotland;
- **Non-governmental bodies:** RSPB, the Southern Uplands Partnership, the Woodland Trust, the John Muir Trust;
- **Langholm based organisations:** Langholm Day Centre, Outpost Arts, the Langholm Alliance, the Xcel project, the Eskdale Foundation; and
- **Funders:** The Holywood Trust, Heritage Lottery Fund, the Robertson Trust, the John Muir Trust, local trusts.

14. Tarras Valley Nature Reserve Creation

In March 2021 the Langholm Initiative purchased 5,200 acres of land (TVNR™), which includes six properties. The day to day management of charitable activities for the TVNR™ is managed by an Executive Committee (EC) and the non-charitable (trading) aspects will be managed by the newly formed subsidiary of Langholm Initiative; The Langholm Initiative Trading Company (SC686219). Formation of the subsidiary will help to protect the asset and the charitable status of Langholm Initiative. Both the EC and the subsidiary are accountable to Langholm Initiative.

Profits from the subsidiary company will return to Langholm Initiative, which will in turn support its core funding requirements for the benefit of community projects and importantly provide Langholm Initiative with an economically sustainable future.

The Business Plan for Langholm Moor will be used as the basis for the development and management of the TVNR™.

A number of working groups may also be set up to manage different aspects of the land and buildings, and members and other community members could be co-opted onto these groups. Also, the estate manager is likely to draw in expertise from other partner organisations to augment the expertise of the board, members and staff. The development manager will be employed during the first three years to support income generation and ensure the sustainability of the reserve. Partner organisations such as the John Muir Trust have given their commitment to supporting this work.

There are also aspirations to purchase an additional *5,300 acres of land and buildings on the north side of the Tarras valley and a funding campaign was started in October 2021 with the aim of securing the purchase by the end of May 2022. A separate Business Plan will guide the management of that work.

* **Feb '23 BP annual review** – the campaign to secure an additional ca5,300 acres was successful and the legal completion of the purchase was completed on 4th Nov 2022. The Langholm Initiative now own ca 10,000 acres of land hereinafter called the TVNR™.

15. Market/Community

The Langholm Initiative seeks to serve the people of Langholm and the surrounding area. In 2021 its range of projects benefitted both local people and visitors to the area. Some of its projects have the potential to benefit larger numbers of beneficiaries, again both local people and visitors e.g. the redevelopment of the Townfoot Sports Centre and the creation of the TVNR™.

The project sectors fall broadly into five categories as shown in Table 3.

Table 3: Main sectors of work the Langholm Initiative is involved in 2021

Sector	Area of work	Comment
Environment	TVNR™ development; eco-tourism, environmental education	Proposed project 'Inspiring Engagement in Nature' – nature based learning and working with volunteers
Education	Digital skills, environmental education, textile skills development, STEM work	Proposed project Inspiring Engagement in Nature
Health & Wellbeing	Townfoot sports centre redevelopment Welcome to Langholm information hub	Feasibility study and design completed; planning constraints require further consideration
Employability	Digital skills, textile skills, Kilngreen Kiosk	Training, support for business
Financial Viability	Tarras Valley Nature Reserve; Fundraising	Staff in post during 2021

Whilst the TVNR™ could be considered as the flagship project, going forward the Board needs to agree where it should put most of its energies in order to allow space in its plans to take up opportunities that arise or meet new needs of the community.

16. Key Relationships and Partners

The Langholm Initiative recognises the benefit that strong partnerships can bring to its work and has a range of partner organisations with whom it works on a regular basis.

17. Volunteers

Most projects work with volunteers to help deliver outputs and the volunteers are essential to the running of the Welcome to Langholm hub. There will be opportunities for practical volunteering within the management of the TVNR™. Volunteering is often a way for people to get back into the job market or to integrate in a new community and it is believed it can have a positive effect on people's mental health.

In the future volunteers might come from other parts of the country to help with such things as tree planting on the nature reserve. Volunteers could be 'awarded' for their work by being offered certificates and at volunteer celebration events.

18. Opportunities for Young People

There are opportunities going forward to offer young people work experience in an office environment or with one of the projects Langholm Initiative is running, either through Langholm Academy or the Supporting the Young Workforce team at Dumfries and Galloway Council.

19. Diversity/Safeguarding

The organisation's equal opportunities and safeguarding policies were reviewed towards the end of 2020 and along with all other policies will be kept under review. This will ensure the organisation safeguards itself, protects staff, volunteers and board members and takes forward projects that take equal opportunities into account in their design and delivery.

20. Assets

The organisation's main assets are its members, staff, volunteers and board members and from the end of March 2021 land and buildings purchased from Buccleuch. It owns IT equipment, rents its office space and leases, rather than owns a vehicle. It is anticipated that the land and buildings will also bring considerable benefits to the community and income stability for the organisation in the long term. It has approximately 90 volunteers which it can draw on to support its work at a number of different levels.

21. Information Technology

The Langholm Initiative will review its IT requirements regularly to identify any improvements required to support its business. It will also look at the best way of sharing files and information amongst staff using drives or a cloud approach. It will look at virus software and ensure internet safety measures are in place.

22. Green Strategy

The organisation looks at ways in which it can reduce waste and save energy. The TVNR™ means that the Langholm Initiative will be involved in woodland and peat land restoration as well as potential small scale renewable energy generation,

which will support combating climate change. That work should enable the organisation to be in a position to trade its carbon. The Langholm Initiative will also look at how to improve the energy efficiency of its properties, including those it rents as its office space. All of these pieces of work will make a positive contribution to national carbon targets. New projects should aim to include mention of the organisation's policy on waste and reduction in energy use.

23. Management of the Organisation

This section looks at Board and staff management, financial management, performance management and risk management.

i) Board of Trustees

The Board of Trustees convene regular monthly and ad hoc meetings as deemed necessary.

The Constitution provides specific details of categories, eligibility and powers of Trustees.

In addition to regular meetings the Trustees aim to hold a dedicated annual meeting (so called away day) where they will be able to review and discuss the Business Plan and if necessary update and agree appropriate actions.

A skills audit of the board was undertaken, as part of the business planning process for Langholm Moor community buyout that demonstrated the board members have a wide range of key skills. This was repeated in early 2021 and this can be reviewed annually in order to ensure there are no skills gaps in the management team. Roles of Board members with other organisations in the town could be reviewed to ensure there are no conflicts of interest.

The Board could explore ways in which it can ensure its members are all active and for the future consider how it can recruit younger people onto it. Some thought should be given to developing a succession plan.

Board members could 'buddy up' with each other and staff members to ensure there is shared understanding and learning about the projects and the work of the organisation.

ii) Staff Management and Human Resources

There is a clear aspiration to employ an office manager who can be responsible for co-ordination of the work of the organisation and many of the tasks identified below, but this is subject to funding being secured.

Human resources policies have been reviewed and updated. Further procedures regarding staff management will be developed based on these and a management structure agreed and recognised by board members and staff.

Board members recognise that their role is primarily strategic and not operational although at times they will need to be involved in operations in support of staff. Induction packs and guidance should be in place for new board members as well as governance training.

It is helpful to have one Board member, or more, allocated to each project wherever possible so that project managers have a relationship with someone on the board who knows the project thoroughly and can offer guidance and support to the staff member. Line management has normally come through another staff member or the Chair of the organisation.

Staff development and training opportunities could be strengthened so that staff develop in their working lives. Regular staff appraisals, either six monthly or annually could help identify skills that staff would benefit from developing. These sessions could also offer staff the opportunity to give feedback to the Board about the organisation and its management arrangements.

iii) Financials

The financial position of the company as of 2022 is significantly different (positively) from previous years due to the impact associated with the funding campaign for community land purchase from Buccleuch Estates (as mentioned earlier in this document).

The Financial Administrator provides a report and financial status of the company at the monthly Board meetings.

A copy of the audited accounts can be found in the governance section of the Langholm Initiative website:

<https://www.langholminitiative.org.uk/governance>

Feb '23 BP annual review - due to the increased level of income the organisation applied for and received VAT registration from HMRC valid from 4th Nov 2022. The organisation also commenced a VAT and tax review by external consultancy during 1Q 2023.

Table 4: Financial Highlights taken from the audited accounts for reporting periods ending in March 2021 and 2022*.

Item	Total Funds / Costs	
	2021	2022
Income from reporting period (includes donations, grants and legacies)	£4,310,650	£1,200,842
Total restricted funds for reporting period	£4,247,342	£1,145,738**
Total unrestricted funds for reporting period	£63,308	£55,104**
Total expenditure (excludes land purchase)	£218,720	£328,535
Cash and cash equivalents at end March 2021/2022 (after purchase of land)	£320,553	£1.045.311

* Feb '23 BP annual review - table updated to align with 2022 accounts.

** Feb '23 BP annual review - this is the income and endowments generated during year and NOT the funding amounts per balance sheet.

Currently the running costs of the organisation have to be found mostly from project budgets. It would be helpful to identify a 'daily rate' for a management fee, or a percentage of overall project costs which can be included in costings and to be able to include a cost for office costs and other overheads. However, not all funding bodies will offer such 'full cost recovery'.

When creating a budget and costing a new project, staff would benefit from the organisation having a framework which sets out key costs in relation to salaries and on costs, rental, electricity, management fee and other items to ensure there is a standardised way of creating a project budget. Perhaps the organisation could adopt a sliding scale for salaries.

The Langholm Moor business plan has demonstrated that there is the potential to generate surplus income from year one which will be able to support the management work on the land.

The fundraising strategy covers other aspects of grant and other funding and additional ways for the organisation to raise funds.

The organisation could seek donations from its members either on a regular basis or for one off pieces of work either through crowd funding or by a request via a mailshot to members, highlighting particular pieces of work that are proposed.

Langholm Initiative has recently reviewed and updated its financial procedures and these will be reviewed regularly in order to ensure they remain fit for purpose.

iv) Performance Management

The organisation would benefit from having a set of indicators against which it manages and measures its overall performance and is able to report to its members. This would help to demonstrate progress towards a set of organisational aims. It could use format such as the one below to set these out on an annual basis. A workplan would be developed based on each aim or area of work. However, ideally operational management and delivery of this work should rest with a manager and so is subject to funding becoming available.

Table 5 provides an example of an approach to development of performance management.

Feb '23 BP annual review - table 5 updated with traffic light indicators.

Table 5: Example of approach to performance management of the organisation

Organisational aim	Activity/Outputs	Milestones	Indicators	Status Feb '23
Put in place a framework for review of updating of HR policy documents	HR policies are in place with date of agreement by board and dates for review	Suite of policies developed Policies agreed and signed off by the Board Framework for review in place	Policies in place Procedure for review in place Annual reviews taking place	Procedure for review is in place. Annual review taking place in 1Q '23
Respond to community need by developing new projects to address them.	Projects developed and funding in place to deliver these	Pieces of research/community engagement or feasibility studies carried out; projects developed; funding applied for; funding secured; project commenced	New projects achieve funding Projects delivered and meet the milestones and targets set for them	Focus in 2022 primarily on current projects and how to enhance with additional funding or added skillset/resources. As such this target deemed to meet expectation but Trustees may wish to consider how to identify further community benefit projects as and when capacity allows.
Communications with members and the public is increased	Regular communications sent out to members; social media is updated frequently	Monthly newsletter prepared and sent to members Website regularly updated Membership increases	Press coverage noted Feedback from members	A disconnect identified between issue of project and LI newsletters – this is being addressed. Recognised that communication with members could be better and requires improvement.

	Generally meeting requirements and expectations
	Requires further work to meet requirements and expectations
	Is not meeting requirements or expectations

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v) Risk Management

Every organisation carries a set of risks and Langholm Initiative Board members should identify the key risks to the organisation and identify mitigation measures it can take to reduce the risks.

These could range from the legal to the financial and being aware of these will enable the organisation to be more resilient. A risk matrix is used for the Townfoot Redevelopment project and a similar approach could be used for the organisation as a whole.

Some of the potential risks to be managed might include:

- Recruitment of new Board members over the next 5 years;
- Replacement of key staff through retirement or for other reasons and loss of organisational memory (lessons learned and what went before);
- Litigation from staff, volunteers or members of the public;
- Dangers to staff of lone working or working in risky environments;
- Ability to find funding for projects and to sustain the running of the organisation;
- Injury to staff, volunteers or beneficiaries incurred in the course of project delivery;
- Risk to vulnerable people from board members, staff or volunteers;
- Loss of office space; and
- Fraud.

Board members should spend time agreeing which risks it wishes to manage and agree an approach to putting this into practice e.g. development of a risk register*.

* **Feb '23 BP annual review** - an initial draft for a risk management plan has been prepared and will be further developed by Trustess during the next reporting period.

24. Conclusions

Possible actions arising and to be considered during this business plan cycle include as aspects such as;

- Organise on-going training for board members and staff on fundraising and preparing a funding application;
- Agree the best approach for co-ordinating the management of staff;
- Develop a methodology for deciding on what projects to take forward in the future to ensure these are in line with the organisation's purpose and aim to carry out research to demonstrate that project proposals have a sound basis and evidence of need;
- Continue to deliver innovative projects but be mindful of how these can be continued and sustained if they are successful in hitting targets and benefiting people in the community;
- Be mindful of becoming overstretched in terms of resources to avoid burnout of staff, board members and volunteers – have regular ways to check on that;
- Consider devising a succession plan for Board members, staff, volunteers;
- Consider how volunteers can be used in different ways within the organisation to make the most of their skills and experience;
- Be able to monitor and evidence success of the organisation as a whole by setting targets and agreeing outcomes and being about to measure progress towards these;
- Continue to strengthen and improve public relationships and marketing – telling the story of what the organisation does and the benefit it brings;
- Continue to build strong networks across the South of Scotland and nationally and participate in networking organisations;
- Agree the set of risks the organisation should mitigate against and monitor; and
- Strengthen the ways in which the work of the organisation is publicised and championed.

APPENDIX 1 – Indicative List of Past Projects

As well as delivering projects, Langholm Initiative has always been involved in enabling other organisations and events to emerge. Some of these are listed below.

- Equestrian activities in Eskdale 2001
- Painting Challenge
- Community energy project 2003
- 2005 Business Gateway satellite office
- Eskdale training group 2006
- Community composting project 2006
- Youth seminar in Hungary 2007
- Homecoming 2009 (Gaelforce)
- Making the most of the moorlands
- Moorland education project 2009 -2011
- Living with the Land – looking at the future of Eskdale
- Christmas lights/open air market 2010
- Network WEST (women’s organisation)
- Making Tracks – Reiver trail
- Heritage and Culture group
- European twinning village associations project visit to Finland and hosting Finnish visitors
- Disability awareness
- LEAP Langholm and Eskdale Accommodation Providers
- Working with CADISPA on a community planning study of Langholm and Eskdale 2012
- 2018 A fresh look tour (of Buccleuch Mill)
- Managing tourist office volunteers – continues in Welcome to Langholm hub

APPENDIX 2 – SCIO Objects and Purposes

The SCIO's purposes are to benefit the communities of Eskdale & Liddesdale as defined by the postcode districts of DG13, DG14 and the land area of TD9 within the Tarras Valley Nature Reserve (the Community) with the following objects:

1. The advancement of education by providing a framework for local people to enhance their existing skills, to improve their potential for economic activity and/or their quality of life.
2. To advance citizenship and community development by working with local businesses, employers and regional agencies to propagate community regeneration in the operating area by maintaining or improving the physical, social and economic environment and to assist those in the community who are at a disadvantage through social and/or economic circumstances.
3. The advancement of environmental protection and improvement through the provision of opportunities to engage with the local environment.
4. The advancement of arts, heritage, culture and science by supporting participation and access to creative and cultural activities through engagement with partners and development of related projects.
5. The provision of recreational facilities or the organisation of recreational activities with the objective of improving the conditions of life for the persons for whom the facilities or activities are primarily intended.

APPENDIX 3 – Key Opportunities and Challenges

<p>Opportunities:</p> <p>Key location in the centre of the South of Scotland on a main road network and close to the M6.</p> <p>Being a community landowner and creating a nature reserve.</p> <p>Large areas of high-quality natural environment on our doorstep;</p> <p>Vibrant community with a rich cultural heritage.</p> <p>New housing development with ‘extra-care’ units for older residents and people with disabilities soon to be created.</p> <p>A community which has devised a community plan and a new organisation which Langholm Initiative can work with to deliver community benefits.</p>	<p>However we have:</p> <p>An ageing population.</p> <p>Potential job losses with the impact of the Covid-19 pandemic.</p> <p>Transport and connectivity issues.</p> <p>A fragile community sector which is delivering significant services for our population.</p> <p>Rural communities around us.</p> <p>Challenges for people in accessing further and higher education while residing at home.</p> <p>A fragile industry base.</p> <p>A changing physical landscape with new forestry and wind turbines in planning.</p> <p>A low wage economy.</p>
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APPENDIX 4 – Business Plan Annual Review 2023

This Appendix has been added to the 2022~27 Business Plan subsequent to the Trustee’s annual review of the plan in February 2023.

The aim of the review **was not** to ‘rewrite’ the original plan but rather update and place emphasis where it was deemed relevant to what is considered to be a ‘live’ document.

In order to simplify the review and update administration the Trustees have:

- placed brief highlights/notes in the body of the BP where deemed relevant;
- have added this additional appendix 4 in order to summarise the key changes;
- placed and updated copy of the BP in the Governance section of the website;
- have shared and made all employees aware of the update; and
- will mention the review and update to members via its annual report for 2022/23.

Summary of relevant changes include:

Section	Title	Comment
1	Introduction	Margaret Pool resigned as Chair on 10 th June '22 and John Hanrahan became new Chair. Ref Board MoM 10 th June '22.
5	Objectives	The objectives remain broadly aligned from 2022 to 2023 and therefore remain applicable whilst noting that the Langholm Initiative was successful in being accredited as a Living Wage Employer in February 2023.
9	Location	Welcome to Langholm project name changed to Langholm Information Hub in Feb '23.
14	Tarras Valley Nature Reserve Creation	Footnote added to reflect that the second community land purchase of a further ca 5,300 acres for TVNR™ was finalised on 4 th Nov 2022.
23 iii)	Financials	Table 4 summary of financials updated to include 2022 annual account data. Line added mentioning that organisation is now VAT registered and undertaking a VAT/tax review during 1Q '23
23 iv)	Performance Management	Table 5 examples of performance management high level indicators remain broadly applicable and an additional column has been added to provide an indication of status as of Feb '23.
23 v)	Risk Management	An initial draft for a risk management plan has been prepared and will be further developed by Trustess during next reporting period.
24	Conclusions	Trustees recognise that the list provided is broad and diverse. During the next reporting period they will seek to try and align the list with aspects such as Appendix 3 - Opportunities and Challenges and consider discreet grouping.

Signed:



John Hanrahan, Chair. 27th February 2023.