

Cupar Development Trust: Forward Plan 2018

Cupar Development Trust is a community-based organisation, registered in December 2015 as a Company limited by Guarantee (SC522831)

Pre-ambles

2018 will be the third year of Trust activity. During the initial two years the Trust entered into initiatives which will require programmed action and funding for some years to come. The document now presented provides a plan of action by the Trust to be undertaken in 2018.

The document begins by reminding us of what the Trust aims to be. Under the heading of key resources, we identify the limited human capacity of the Trust and also indicate how the Trust depends upon securing public grant funding and accessing expertise.

The key functions which the Trust undertakes are identified. The Trust's management processes are focused around the 'front end' planning of initiatives. These are described identifying their stage of development. Taking stock, the action to be organised by the Trust in year 2018 is outlined.

1. What we seek to do

Our objects are: *"The advancement of community development, including the advancement of urban and rural regeneration; the advancement of citizenship; the advancement of environmental protection or improvement; the advancement of the arts, heritage, culture or science."*

As a catalyst of change we have focused our attention upon initiatives aimed to promote the vitality of the community and also secure environmental improvement of the town centre.

As a community development body, the focus of the Trust is in fostering new initiatives. Our raison d'être is to realize the opportunities which otherwise would be missed. These are initiatives that can be community-led and will mobilise volunteers to assist in the necessary delivery work. The development of such initiatives most often requires to be supported by securing grants and donations.

Our values and culture are embodied in our interest to function as an accountable community development body. As a non-profit distributing private body the Trust takes forward projects within productive partnerships. These projects emerge from dialogue with the community and are shaped by assessment of opportunities, outcomes and resource requirements.

In progressing new initiatives, the Trust works with individuals, community groups and supporting public organisations including Fife Council. The intended outcomes of the Trust's actions are to have made more of our cultural and heritage assets and to have secured development and improvement of the built environment within the town centre to the benefit of the Cupar community.

The Trust holds consultative occasions where two-way exchange occurs. Information about the Trust's policies and activities is made available on its web-site and through newsletters.

2. Our key resources

The Trust is a small body with 40 local members.

The Board of Directors leads the Trust and presently comprises eight individuals. The Directors are the Trust's prime source of drive, ideas, expertise, experience and local knowledge. The Directors are volunteers and unpaid.

The preparation of grant applications to fund the development of initiatives is an essential part of the Board's work. The Scottish Government and the Big Lottery have enabled the Trust's work by providing development grants. Fife Council have provided 'seed-corn' grants and much advice. We greatly value this support.

The Board is building valuable links with other bodies both local and external. Accessing external expertise and professional advice is essential for 'front-end' project planning and subsequent development. The Trust has commissioned professional firms to gain their expertise. Other professionals have kindly advised without charge. Our membership of Development Trust Association Scotland has been a valuable source of experience of the operation of community-based trusts.

3. Our key functions

As a catalyst, the Trust aims to promote improvement (interpretive, physical, environmental and thus economic) within the town centre.

The Trust will provide five key functions:

1. Setting the Direction
2. Financing
3. Project Planning
4. People Development
5. Support Services

In the management world the sets of activity carried out in performing business functions are called 'processes'. A 'process' is the sequence of actions required to produce a desired result.

Initiatives start by establishing what is desired. Through planning and project management what we require to do to achieve desired results is identified and action organised. Careful consideration is required to ensure that the project plans can be financed and that suitably skilled people will be available to deliver the project.

To successfully plan and deliver non-commercial projects the Trust has to secure grant funding and to mobilise skilled people as consultants and also volunteers at appropriate stages in the development journey.

Process 1: Setting the Direction

Shaping Cupar's future involves:

- Envisioning – thinking beyond the here-and-now
- building a network of people and groups who share the new vision of what is possible
- motivating those supporters to come together to bring the desired improvement about.

Every initiative must engage key individuals from relevant groups and bodies. Forming the team who will champion a vision and sponsor making it happen is essential. The process begins by assembling together a team of decision-makers who resolve the initial shape of what they think is wanted. That team engages appropriate decision-shapers, often consultants with the necessary skills to research, design, plan and cost. Consultations with the local public and agencies are held. The consultants develop proposals and discuss these with the increasingly enthusiastic team of decision-makers. The latter, who are minded of the local context, may re-think the proposals but gradually a vision – often as a mission statement - is established.

Process 2: Financing

'Seed corn' investment is often required to do research and gain expert inputs to support the initial phase of initiating a community venture. This 'oils the wheels' and helps informing a committed team and establishing their mission.

Community projects face the reality that funding, both for capital and especially for recurring costs, is limited. Applications for grant, especially when the sum requested is large, must demonstrate that they have been carefully assessed on considerations of feasibility, cost, legal compliance, regulatory approvals, and social benefit (taking account of relevant community stakeholders). Each project has to be seen as sustainable and this is demonstrated by a viable business plan and budgets. There must be sound governance and the project sponsor and project team identified. Demonstrating that the project planning has been complete and well-made is now essential for drawing down grant funding.

Process 3: Project Planning

Project Planning: The vision and the broad proposals associated have to be converted into do-able projects. Project planning has two stages and then plans are applied through project management:

- i. Preparing the business case for establishing a project. This involves conducting a mini-analysis of the proposal and its context to assemble enough information to establish the project goals, scope, costs and benefits, the obstacles and risks, duration, and expected result. This account provides the basis for deciding whether or not to proceed with the project. This high-level of planning is essential when preparing funding applications for larger projects.
- ii. Planning next entails describing the approved project in the form of a statement of work. This level of planning is operational. This describes the purpose, activities, budget and accountabilities, etc. It provided the project leader with a clear route map for organising the work of the project team.
- iii. Project management: The team leader has to match the work required to complete the project making use of the people resources available. This involves breaking down the

complexity of what is to be tackled into manageable parts. Each part has a clear result to be achieved. Each part involves tasks which have to be completed and sequenced to produce the desired result. Individuals are made responsible for leading the performance of the parts of the project and they in turn are coordinated by the team leader.

Process 4. People Development

The Trust has pursued the 'front end' planning of large developments which emphasise the use of generic skills of visioning and strategy development, leadership, cooperating with stakeholders, creative thinking and analysis, and decision-making. The Trust's Board members have professional and management backgrounds and the application of their high-level understanding enables the decision-making required for initiating ventures, obtaining grants and project planning. The Board will continue to draw upon the planning skills of the Board members and will make use of experts as required. The Board recognize that we require to attract suitably-skilled individuals to join the Board or to be available to provide advice and help when asked.

However, when the Inner Court and Interpretive Plan proposals are progressed into applied projects, then operation-level skills including using project management, resource management, team working, communication, and effective delivery, will be required.

The Board should ascertain the skills and experience of the members of the Trust. There are local organisations in Cupar which provide support to local groups and organisations for the training of volunteers, etc. The Trust will wish to co-operate with these organisations to enlist volunteer team leaders and develop team-building in providing support for the 'on-the-ground' delivery of projects and events. Leading this people development activity requires holding an appropriate skill-set.

The Trust may not involve itself in operational team-work. However, people development may be required by our partner organisations undertaking projects.

People development is a new activity for the Trust. The specifics of the roles to be played by the Trust will require to be carefully considered mindful of the existing capacities of organisations. The Board is conscious of the cost implications of this activity and will wish to be certain of how it is funded.

Process 5: Support Services

The Trust's activities must be well-supported by effective organization and good management system and practice. These include: sound governance, complete financial systems, good communications and supporting human resource management.

4. What do we do in 2018?

The Trust is involved in three large initiatives:

1. The Inner Court Development
2. The George Inn Pend
3. The Cupar Town Interpretive Plan

Additional to these initiatives the Board may decide during 2018 to become involved new activities.

The Inner Court Development

The Inner Court Development is an ambitious scheme for the clearance of derelict buildings and the development of new housing in a centrally located back-land area of the town centre. The Trust brought together the projects partners (Kingdom Housing Association, Fisher & Donaldson and Fife Council). All cooperating in this venture share the intent of tackling dereliction and providing new housing so reviving the town centre as an attractive place for residents and visitors.

A concept design of the layout and content of a new Inner Court was commissioned from architects who had good understanding of the historic character of the location. The development proposals have attracted favourable public comment and the design and layout have provided the basis for establishing estimates of cost of development.

The development partners have identified the matters to be resolved during the pre-development stage of the venture. The project now requires to be taken forward through regulatory approval and funding stages, there-after proceeding into site clearance and development. The process is complex and requires to be led by a professional manager.

Action IC I: In 2018 Kingdom Housing, who will be the lead developer, will appoint a project manager to coordinate planning and development activities going forward. The Trust will participate in the preparation of a joint Planning in Principle application.

The Trust's involvement in the development of the Inner Court will be to ensure the efficient renovation of the stone-buildings (described in the next sub-section) within the context of the larger Inner Court Development. This will require close collaboration with Kingdom Housing.

Action IC II: For this purpose the Trust will remain on the joint management group represented by the lead Trust Director, Des Montgomery.

Action IC III: There will be a requirement for applications to be prepared for capital grant for the development of the Inner Court. Kingdom Housing, the Trust and Fife Council will collaborate on the preparation of the package of grant applications.

The George Inn Pend

The Board has elected to sponsor the renovation of a set of stone buildings on the south side of the George Inn Pend. Their location makes these buildings a key part of the Inner Court Development. There are three buildings involved. All require extensive renovation.

The concept of using these buildings to become a "Creative Industries Hub" has been examined. The market prospects and the possible rental income have been assessed. A design and costing study of the renovation has been completed. However, there may be alternate community uses for these buildings which deliver greater community benefit.

Action GIP I: In 2018, the potential uses of renovated buildings will be the subject of a consultation of community interests. The consultation will have two aims:

- i. It will provide an opportunity for local people to express their views and offer suggestions on the use of the buildings they would wish to see realised.

- ii. It will help identify key individuals willing to be part of a working group who will act as the community 'customers' for the project. The aim is to establish a group which may become the users/tenants of the property when the renovation is completed

Once the 'customer' group is in place and the future use(s) of the property is established, then project planning can be completed.

Action GIP II: The funding of the purchase of the buildings and of the renovation has to be found from public grant. The Board will want to reach an agreement in principle with Kingdom Housing over the purchase price of the buildings and to confirm in principle that the renovation can be carried out as part of their contract for site development at an agreed price.

Action III: The Board will have to prepare applications to grant sources for acquisition, pre-development stages and for construction costs.

The Cupar Town Interpretive Plan

The Town Centre Charrette emphasized the importance of celebrating Cupar's historical heritage as a key part of the identity of Cupar as an attractive 21st market town. Subsequent action was taken to prepare the Interpretive Plan the focus of which developing the capacity of Cupar Heritage and other heritage-minded local organisations build the knowledge of the heritage story and to make Cupar's heritage visible, in turn providing the community with increased understanding of Cupar's history and serving to attract visitors.

A Working Group of leading individuals from heritage and business organisations was established, grant secured and heritage consultants commissioned. The product of the process has been the completion of the Cupar Town Interpretive Plan. This sets out proposals for making more of Cupar's history and heritage environment and identifies how through the application of digital solutions much can be done to increase townsfolk and visitor appreciation of the town. To extend the network of support, the Trust established the Interpretive Plan Consultative Forum as a method for spreading information of the progress of the Plan.

The formation of the Working Group has been the vital first step of this initiative, and with expert consultant advice, a strategic view of how to progress the interpretation of Cupar's heritage is now established.

Action IP I: In 2018, the Working Group will concentrate upon establishing the framework for collaborative project funding and management and upon selecting the initial projects.

Action IP II: The continuing involvement of our heritage consultant has been invaluable allowing us to form indicatively costed project packages. The preparation of applications for grant funding will be made.

Action IP III: The Working Group recognises that implementing the proposals of the Interpretive Plan will require the on-going project management of projects. This will also call for coordination of projects, sharing key expertise and involving some pooled-funding. The operational management of the Interpretive Plan projects will spread over several years. A vital management resource requirement is for funding of core posts.

Action IP IV: The post-holder will be working closely with the project team leaders. The post descriptions, person specification and key accountabilities will require to be established, as will employment standards and procedures. The funding for posts will be included in applications for grant support.

New Initiatives

The provision of a new post to support the organisation of annual Events has been suggested. Also there is the idea of the Burgh hosting the celebration of the Anniversary of the “Three Estaites” in 2022. The major event would draw upon and stimulate the cultural activity in the town.

Coordinating the contributions of local organisations and volunteers in the production of events and celebrations requires a relevant personality and skill-set and would be a funded post.

Action NI I: The Board is willing to explore with relevant organisations the scope for coordinating events management with a view to establishing a sustainable post to promote and support event provision including a production of the Three Estaites in 2022. Funding of the post will require securing grant preferably on a rolling basis.

Support Services

The operation of all key processes must be well-supported by effective management systems and good practice. These include: sound governance, tailored financial systems, good communications and supporting human resource management.

The increasing demands of the initiatives requires that the Board is enlarged by the co-option of additional individuals with relevant professional, fund-raising and management experience.

The developing activities and potential to engage staff also requires the Board to strengthen how we organise to manage. Crucial to this is the distribution of responsibilities within the Board.

The Board has identified roles as follows: Chair, Treasurer, and Board members with specific responsibilities for Communications and Membership; Governance policy; the Inner Court; and the Interpretive Plan.

Action SS I: A Minute Secretary is essential. This role may be combined with that of a Vice-Chair.

Action SS II: Whereas the collaborative planning relationship with Kingdom Housing and Fife Council is led by the leader of the Inner Court Working Group, there is the leadership role required work with a ‘customer’ working group tasked with preparing the business plan for the operation of the renovated properties. A Board member will lead in this role.

Action SS IV: The Trust must conduct a ‘skills and interests’ survey of the members, and identify whether there are individuals who, although not wishing to serve as Board members, would be prepared to be an active member of a working group, or of temporary mini-project teams. The aim will be to have knowledge of a pool of members who can be called upon.

The Trust will also have to co-operate alongside Fife Voluntary Action and like organisations to enlist volunteer team leaders, for team-building and in providing general support for the ‘on-the-ground’ delivery of projects and events. A Board member with appropriate understanding of the ‘skills and training’ sector is required to take on this increasingly necessary responsibility.

Action SS V: It is probable that the Board will want to secure grant funding for the appointment of staff to support the roll-out of funded projects. It will be essential that we become clear of the roles the post-holders will be required to fill and that the recruitment process is effective.

If the Trust is to have employees an HR strategy will be required to ensure that Board members are aware of the terms of employment and the obligations entailed. The use of volunteers will require to be considered. A Board member with a back-ground in the management of human resources will ideally take on the responsibility to provide the Board with an HR strategy and to lead on mapping the staffing requirement.

Action SS VI: The Interpretive Plan Working Group will be identifying projects to be taken forward. Initially these will be expressed in business plans and as applications for grant. When funded these projects will require to be treated as costs centres with appropriate accounting and record-keeping systems in operation. The Treasurer will be required to make appropriate systems development.

David Kirk, Chairman

December 2017