



A COMMUNITY ENTERPRISE FOR EXBOURNE & JACOBSTOWE

# BUSINESS PLAN

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November 2009 (Updated February 2010)

## **EXECUTIVE SUMMARY**

This Business Plan sets out the development of an innovative project which will provide a community enterprise centred on core principles of sustainability. The enterprise will establish a permanent shop, café, Post Office and community centre which will promote quality local produce and offer access to services. In this way, it will play a central role in supporting the vitality and well-being of the local community and will address current and longer-term needs which have recently been identified. The current temporary facility, located in the Village Hall, is severely constrained by a lack of space and provides no opportunity for further expansion of floor space or opening times.

The parish of Exbourne with Jacobstowe is deeply rural and is recognised as one of the most deprived when measured against other communities in terms of access to basic services. Research has also identified a clear need for a replacement shop and Post Office facility in this community.

The total cost of the project, including land acquisition, construction, fitting out and associated professional fees and consents, is estimated at £296,991 (capital) and £44,640 (revenue for the first year). To date £185,000 has been raised through a combination of grant funding, income from shop and café sales in the temporary facility, and local community fundraising.

Funding for the capital works will come from a combination of local fund raising and external funding sources. The aim is to begin construction in the Summer of 2010 and complete in Spring 2011.

EJCAL will retain overall responsibility for delivery of the project. A full time manager will be employed to run the trading operation, with the support of a part-time member of staff and a team of volunteers. The Post Office operation will be provided through a partnership service in conjunction with North Tawton Sub-Post Office.

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## 1. THE BIGGER PICTURE

### 1.1 Aims and Objectives

The aim of this project is to provide an innovative community enterprise, based on sustainable principles, which meets present and future local needs by providing a shop and community centre offering access to services, promoting quality local produce and rural crafts, and supporting the vitality and wellbeing of the local community.

The objectives are:

1. To build, by Spring 2011, a showpiece community shop, café and Post Office which will provide a broad range of services including an open-access internet space within the heart of the community.
2. To champion quality local produce and rural crafts; provide a direct outlet for local producers, and a focal point for the networking and support of local small businesses.
3. To strengthen community spirit and cohesion by providing an easily accessible hub which offers support for excluded groups including young people, the elderly, disabled and under-employed; and a site for community information under the Government's Village Hub scheme.
4. To benefit the local economy by increasing spend within the community, by locals and visitors, and maintaining that increase.
5. To provide complementary support to local authority services, including Social Services and local GP Practices, this is particularly important for older residents.
6. To reduce the carbon footprint of the community by reducing food miles and reliance on private transport.

### 1.2 Why the Project is Needed

The parish lies at the heart of a deeply agricultural area which was badly hit by a Foot and Mouth outbreak in February 2001.

Out of the thirty three thousand wards in the country, Exbourne ward is the 65<sup>th</sup> most deprived, measured by lack of access to housing and services (i.e. public health services, public transport and local facilities such as Post Offices and shops)<sup>1</sup>. In the 2004 Annual Report of the Director of Public Health, this area was classified as the second most deprived area within Mid Devon.

The recognised need for rural communities is to establish a physical 'hub' which can provide services and social contact. This need is recognised in a range of strategic documents including the local Market and Coastal Towns Initiative (MCTI) Community Plan; Devon Strategic Partnership's Sustainable Community Strategy; and Devon County Council's Strategic Objectives.

At local level, the need for an enterprise of this kind has been evidenced in a Parish Plan published in 2005, and in feasibility studies, market research activities and other community consultation undertaken by the Exbourne and Jacobstowe Community Association Ltd (EJCAL) to date (details of these community consultations are provided in **Annex A**).

The closest shopping centres are in Hatherleigh, six miles to the west and Okehampton, six miles to the south. Current bus services have recently been reduced and are not always suitable or convenient for special needs, such as hospital and other medical appointments.

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<sup>1</sup> DETR Indices of Multiple Deprivation 2000

The two linked communities of Exbourne and Jacobstowe have a combined population of 535, of which approximately 50 per cent are over 60 years of age and either retired or semi-retired. Seventeen per cent of these are dependent on public transport. However, as a result of the current economic climate and concerns over climate change, those with their own transport are tending to use their cars as little as possible. This is evidenced by an increase in the use of the temporary community shop. At present, approximately one and a half per cent of the population receive State benefits although this proportion is expected to increase during the next few years.

Under West Devon Borough Council's recently adopted Local Plan, a limited amount of development is proposed for Exbourne and it has been assumed that a local store, Post Office and café, together with the local primary school, will be part of the facilities available. It is envisaged that a site north of Stowe Lane (almost adjacent to the proposed Burrow site) could accommodate up to 15 dwellings.

The temporary shop and café in the Village Hall in Exbourne has proved enduringly popular, further demonstrating the demand for a permanent facility. In January 2008 Reaching Communities (a part of the Big Lottery) provided a grant of £13,976 to enable EJCAL to employ a part-time manager to run the temporary facility. Further grants have also been received from other local funders to enable the continued employment of the part-time manager. **Annex B** provides a précis of the origination, history and development of EJCAL and the temporary shop, café and Post Office facility. **(Page 29)**

### **1.3 What the Burrow Project Will Achieve**

#### ***Broadening access and increasing use of existing services***

Compared to the current part-time enterprise based in the Village Hall, the Burrow will allow considerably increased opening and Post Office hours and will widen the range and quality of stock, both of which will attract more customers and service users. We will introduce a home delivery service for the elderly and disabled.

The Burrow's multi-use building will meet all modern DDA and best practice guidelines for accessibility, which the current location of the temporary shop, café and Post Office in the village hall cannot achieve.

#### ***Creating a wider range of services***

The Burrow will provide a flexible multi-use space to accommodate many of the currently unmet needs of our community, both now and in the future. It will also greatly extend the range of services and activities provided by the current temporary facility.

#### ***Better education and training opportunities***

The Burrow project will provide a broad range of training and work-based learning experience for both staff and volunteers. An open access IT facility will also be provided, giving access to on-line education and training opportunities. The provision of IT training for local residents will also be significantly enhanced by the new facility.

#### ***Improved skills knowledge and capacity to meet community needs***

The project will support local food producers and other types of local enterprise, many of whom are small or micro-businesses, enabling them to diversify and develop their local customer base.

Experience gained through the project will increase the ability of key individuals within the community, building on their confidence and enabling them to tackle other projects and initiatives.

The Burrow will be a physical asset, owned by the community, and will provide a platform from which future regeneration initiatives can grow. Financial surpluses generated by the project will be used to assist other complementary community initiatives such as the Local

Growers' Group; Exbourne Pre-school and Exbourne Playing Field Association. EJCAL is applying for charitable status and the Burrow would therefore become a subsidiary of the charity, thereby enabling trading profits to be directed towards supporting other local community projects.

Extensive networks continue to be developed through the activities of the project and these include:

- A local produce supply chain network
- Information exchanges with community enterprises across the UK and beyond
- Links with funding and advisory organisations
- Support networks for the vulnerable and elderly

***Premises that use less energy, cause less pollution, create less waste and contribute positive action to combating climate change***

The proposed building has been designed to minimise its environmental impact in all respects. In particular, the earth sheltered design will help to reduce heat loss. Re-instatement of the existing field above the roof of the building will minimise land take, resulting in multifunctional land use.

A geothermal heating system will provide space heating and hot water. The building design also maximises natural light and ventilation and in addition, low energy lighting and low water consumption sanitary fittings will be specified. Environmentally friendly finishes and re-used or recycled materials will be used wherever possible throughout the building.

When operational, the project will work with local producers to reduce packaging and food miles.

***Local produce***

Since its establishment, the temporary facility has developed strong links with local producers and has actively marketed local fruit, vegetables, meat, dairy produce and bread. A grant from the Carnegie UK Trust, in September 2005, enabled EJCAL to employ a co-ordinator on a nine month contract to establish and develop the Exbourne Local Produce Initiative. Links have also been developed with other larger initiatives in the area, such as Taste of the South West and SPAN. As a result of this work, further contacts have been made and an extensive local produce supply network has been established, serving both the temporary shop and regular community produce markets.

With input from the Exbourne Local Produce Initiative, average attendance during the limited opening of the temporary facility has increased to 65-70 people and the combined takings for the café and shop sales have increased from an average of £55 for 7 hours trading per week between January and March 2005 to £250-380 per week for the same quarter in each of the four succeeding years. Current turnover figures are provided in **Annex H**. The Exbourne Local Produce Initiative has clearly demonstrated both the availability of high quality products from local producers and the strong demand for these products by local consumers. The provision of an area for the display and sale of locally produced arts and crafts was also identified as a need within the recently completed Parish Plan.

***Young people***

The feasibility study identified a high proportion of young people living within the community, with 76 residents aged 16 and under. The Parish Plan also identified a need to provide facilities for young people within the community. There is clearly a need for an informal meeting place with facilities available after school and during the holidays. The aim of this project is neither to provide a 'youth club' nor to provide activities which are better provided

by the village hall with its larger floor space. Instead, the intention is to provide a safe environment where young people can meet and socialise in a supervised environment.

Additionally, the project will provide an opportunity for young people to gain work-based experience by assisting with the running of the facility. Some of those young people are clients at Easterbrook Farm, a residential facility for young people with learning disabilities. EJCAL is working in partnership with Easterbrook to support the development of these individuals by offering four work-based learning opportunities within the temporary café and shop. The local Pre-school group also use the temporary facilities as a curriculum-based learning experience to introduce very young children to the concept of shopping and to teach social skills in an adult environment.

### ***Older people***

The temporary shop, café and post office has proved of enormous benefit to the older community, albeit only for three sessions a week. Not only do they use it as a meeting place but it has also become the means of communicating the news that someone is ill or in need, thus complementing local social and health authority services. The parish plan identified the need for a central collection point for repeat prescriptions, which the project will provide through online ordering and delivery of prescriptions from Okehampton Medical Centre.

A large number of older residents have also indicated that they would value a grocery delivery service through which they could support their local producers. The reliance of elderly people on access to Post Office services is well documented.

### ***Support for families***

In addition, since the introduction of Wednesday afternoon opening, a new clientele has taken advantage of the different opening hours, namely young mothers, many of whom live on isolated farms, who find the temporary facilities to be an ideal opportunity to catch up with their friends and relax over a cup of coffee with their younger primary school children, while waiting for their older children to arrive on the bus from Okehampton College. Given the current difficult climate and the general isolation of members of the farming community, this has already proved of considerable benefit.

### ***IT skills***

For those without home computers, access to IT facilities is currently restricted to Okehampton which is six miles away. In addition, although Exbourne has good broadband access, surrounding villages, such as Jacobstowe, Monkokehampton and Broadwoodkelly have very limited, or in some cases, no broadband access. With an increasing need to be able to access services on-line, the provision of a freely available community internet access point, where guidance is on hand for those lacking the necessary skills or confidence, is very important.

### ***Work experience and training***

With a wide network of volunteers and the involvement of young people, more than 20 people per year could receive training through this project. In particular, there is a large group of young women who would either like to return to work on a part time basis, or who have already returned to work but would like part-time employment closer to home. This project will support those seeking to return to work by providing work-experience and training opportunities within the local community.

### ***Experience sharing***

There are a growing family of other villages and communities who are also establishing their own community shops. The EJCAL Committee has been fortunate in receiving advice and support from these communities and would seek to use the experience gained to help and support others to achieve their aims. We have already been approached by community groups in Belstone, Bere Alston, Northlew and Chittlehamholt seeking advice on starting

similar ventures in their villages. We recognise the benefits of such experience-sharing and will continue to develop support networks with organisations seeking to provide similar or complementary services.

### **Relevant Links to Other Projects**

This project is complementary to, and has established links with, the following initiatives:

- Ruby Country Initiative. A Local tourism and produce brand which was re-launched in early 2008. Exbourne lies on the edge of the project area.
- Taste of the West. This organisation promotes quality local produce within South West region.
- Okehampton Farmers Market. Close links have already been developed to supply the temporary shop. This local market has been severely reduced in its capacity and trading hours (once a month only) because of the re-development of the site into a two-screen cinema.

### **1.5 Competing and Complementary Services**

The following services are relevant to the Burrow:

#### **1. Red Lion Pub, Exbourne**

The shop/café will be providing a simpler food service than the pub and will operate at different times. The possibility of combined sourcing and a range of complementary services would benefit both businesses. A letter of support from the landlord of the Red Lion is included at **Annex D**.

#### **2. Doorstep milk and paper deliveries**

Presently there is a limited milk delivery service within the parish operated by Dunn's, a local Exbourne dairy, and one of the temporary shop's current suppliers. Dunns will continue to supply dairy products to the new facility, providing an opportunity to increase their business significantly. Similarly, we run a limited paper delivery service currently and intend to work in partnership with the existing operator to supply papers and journals to the new facility.

#### **3. Local fish supplies**

Two mobile fish vans come to the temporary shop every other Wednesday and Friday. This provides a focal point and an opportunity for customers to meet the local fish suppliers. With the permanent shop facility we will be able to take and hold orders from those unavailable to purchase directly from the fishmonger.

#### **4. Village Hall**

The Village Hall is the current home for the temporary shop, but its facilities do not meet the shop's permanent needs. The Village Hall will continue to host larger community events, rather than the smaller ones which are better suited to the Burrow's facilities, and it will source the food for such events from the Burrow. The two facilities will run in tandem, complementing each other and meeting the needs of the village on a flexible, co-ordinated basis.

## **2 HOW THE BURROW WILL WORK**

### **2.1 Community Enterprise**

The over-arching aim for our organisation is to run the project as a community enterprise, based upon a sound business model which earns its income and sustainability from trading goods and services. The business model for a community-owned village shop has already been tried and tested across the country. Over 40 such community enterprises have been established over the past 10 years, with no closures to date. This compares well with the increasing trend of privately- owned village store closures over the same period. EJCAL has benefited from the experience gained by this network and through the on-going retail business advice provided by ViRSA, and the Plunkett Foundation.

Because the previous privately-owned shop failed, the committee has carefully considered the viability of the new enterprise. This proposal differs from the old shop because:

1. The enterprise is not-for-profit and can therefore operate on lower margins.
2. As the building will be owned outright by the village there will be no rental costs
3. The floor area is far greater than the original shop, enabling a much larger and more varied stock to be held. The floor space and business model used by the new enterprise complies with the requirements set by ViRSA for a viable enterprise.
4. Local goods and produce will be stocked, drawing in visitors from a much larger catchment area.
5. There is provision for a café. Our own experience in the temporary shop, together with that from similar enterprises, shows that the café is a highly profitable element (in our case providing some 20% of turnover) and provides a mechanism for using up stock approaching the end of its shelf life, thereby reducing waste.
6. Although a full time manager and part time assistant will be employed there will be a strong reliance on volunteers, reducing overheads.
7. The location of the new facility on the main road through the village and opposite the school and pub is better for trade. In addition, the Okehampton College bus collects and drops off students at this location.
8. The purpose-built premises have been designed to minimise running and maintenance costs.
9. A marketing strategy will be implemented.

### **2.2 Adapting to Meet Future Needs**

The intention is that this community enterprise will form the focus and stimulus for a number of inclusive initiatives and local outreach services. Potential projects include:

- Local history displays
- Local school involvement
- An oral history project
- A community orchard
- Games clubs
- A library link with Devon Libraries
- An elderly persons lunch club

The infrastructure provided by the project will also allow new and existing community services to develop, for example Meals on Wheels and Good Neighbour Schemes, as well as the continuation of West Devon Borough Council's Access to Services scheme, which currently takes place in the temporary shop once a month.

### 2.3 Organisational Structure

The existing organisational structure, together with the proposed new management structure for the Burrow are discussed in detail at **Annex B**. Annex B also provides a chronological history of the development of the project to date. **Annex C** provides a summary of EJCAL's policies for managing the community business.

### 2.4 Project Support to Date

EJCAL has received significant support in developing the project from a broad range of organisations. These include:

- The Community Council of Devon (CCD)  
CCD provides a range of advisory services and training opportunities that EJCAL will continue to draw upon when the project is up and running. In particular this will include the guidance of the Community Buildings Advisory Service, to enable us to achieve quality assurance system standards.
- Devon County Council
- The Village Retail Services Association (ViRSA)  
ViRSA have provided general support and advice on establishment and management of community shops.
- The Plunkett Foundation  
Plunkett Foundation have provided support and advice on community shops, possible funding sources, publicity, customer services and maximising local producers input.
- Making Local Food Work (Skillshare Mentor)
- The Post Office
- West Devon Borough Council
- Countryside Agency
- Carnegie Trust UK
- Co-Active  
Co-Active has provided advice on pay roll, volunteers and employment law.
- West Devon Environmental Network (Westden)
- Garden Organic
- Sustainable Production in Active Neighbourhoods (SPAN)

Additional local expertise has been drawn on where necessary and includes architectural and green building advice from a local architect; marketing advice from local business people; legal advice from Business in the Community's ProHelp scheme and from Community Matters/Law Works.

Our main stakeholders are:

- Association Members.

Association members have a financial stake (£20) in EJCAL. Shareholders elect the management committee at the AGM and are kept informed of progress through regular newsletters and the website ([www.theundergroundshop.co.uk](http://www.theundergroundshop.co.uk)).

- The local community, who will benefit from access to the services that we will provide.
- The Parish Council.

The parish council have confirmed their support for the project and made a small financial contribution to its development. Monthly updates are given to the Parish Council by representatives of the Association.

- West Devon Borough Council.

The project is strongly supported by West Devon Borough Council. The project has also received advice from the Economic and Community Development Department.

- The Post Office.

The post office is also strongly supportive of the project. EJCAL has been in discussions with the Post Office Area Representative and the North Tawton Sub-Postmaster (who currently runs the outreach Post Office working from the existing temporary shop) to secure the involvement of the Post Office in the new building. EJCAL has obtained an agreement in principle with the Post Office that a Partnership Service in conjunction with North Tawton will operate in the new facility during all retail hours. A letter of support which confirms the commitment of the Post Office to the new permanent shop is included at **Annex D**.

- Local farmers and producers

The project provides a retail outlet for farm produce, crafts and home-made produce as well as opportunities to enable more collaborative initiatives. The Association has already nurtured and supported several new small businesses to develop their local produce.

- Local businesses such as the pub, garage and traders who live and work in the parish.

Employees will benefit from the retail and cafe services. The 'underground shop' will be a draw for visitors to the village. Advertising and display space will also be available to local traders and businesses in the new facility.

- Easterbrook Farm

The temporary shop provides a retail outlet for produce from this local Trust farm which provides work experience and training for young adults with learning difficulties. This will continue in the new facility. They are also part of the Exbourne Growers' co-operative.

- Local craftspeople who are already selling some of their work through the temporary shop

- Okehampton Medical Centre

Working with the Okehampton Medical Centre, the Association will provide a safe drop-off point for prescriptions.

- Age Concern

The Burrow will provide a focal point for advice on the delivery of services to the elderly including IT training and support.

- 'Village Hub'

The Burrow will provide an information point with IT connection to advisory services such as WDBC and Job Centres as part of the Government's new 'Village Hub' scheme.

### 3. FINANCIAL POSITION

Below are details of grant funding received and associated activity carried out to date.

#### 3.1 Costs Incurred Prior to Stage 1 Big Lottery Fund (BLF) Community Buildings Development Grant Award

Item	Cost (£)	Source of funding
Administrative costs	1,000	E4I grant July 2005
Consents	6,000	E4I grant July 2005
Consultancy fees	5,000	E4I grant July 2005
Local Produce Initiative	7,500	Paid for by grant from Carnegie UK Trust September 2005
<b>TOTAL</b>	<b>19,500</b>	

#### 3.2 Costs Incurred in Connection with Stage 2 Development Work Funded by BLF Community Buildings

Item	Cost (£)	Notes
Surveyor's report	500	Included in Capital Project Development Plan
Site investigation	3,400	Included in Capital Project Development Plan
Business plan advice	1,500	
Publicity – newsletters and posters	150	
BREEAM Assessment	588	Included in Capital Project Development Plan
Access audit	350	
Design fees	4,485	
Building Regulations	1,500	
Quantity surveyor fees	550	
Heat pump/ refrigeration feasibility study	1,450	
<b>TOTAL</b>	<b>14,473</b>	

#### 3.3 In-kind Contributions

We believe that the most valuable asset that EJCAL and the Burrow project has is its people. We have estimated that as at January, 2010, 13,264 hours with a value of over £83,934 has been invested so far by volunteers. Table 3.1 provides a detailed breakdown of the work undertaken by volunteers to date.

**Table 3.1.** Breakdown of volunteer hours and activities

Activity	Hours	Rate (£)	Total value (£)
Management Committee and working groups	2,300	6	13,800
Technical experts donating guidance	150	35	5,250
Temporary shop workers and suppliers	10,259	6	61,554
Volunteers organising fundraising events	555	6	3,330
<b>TOTAL</b>	<b>13,264</b>		<b>83,934</b>

## **4 WHAT THE BURROW WILL OFFER**

### **4.1 Services**

#### ***Post Office services***

Subject to agreement with the Post Office and sub-postmaster, the Post Office will offer the full range of services including:

- Letter and parcel weighing and posting
- Licence renewals
- Pensions and benefit payment
- Bill payment
- Banking services, cash deposit and withdrawal
- Foreign currency exchange

#### ***Shop product lines***

The shop will carry as much local produce as possible including bread, home-made cakes and pies, fresh and cooked meats, dairy products, fruit and vegetables, preserves and drinks, together with locally produced crafts. It is expected that 70% of sales will be from local produce. In this context, local produce is defined as goods produced within a 30 mile radius of Exbourne. The shop will also carry a broad range of everyday lines including:

- Staple items (food and non-food)
- Off-licence sales
- Sweets
- Stationery
- Newspapers and magazines

#### ***Café product lines***

The café will provide hot and cold non-alcoholic drinks, cakes, sandwiches, soups and light snacks and will use local seasonal produce wherever possible. Once established, EJCAL will work to establish a Breakfast Club for local students. Currently, Okehampton College pupils must wait opposite the proposed site for their school bus. The new facility will therefore provide an opportunity for students to have a healthy breakfast whilst they wait for the school bus.

#### ***Buying policy***

Local produce will be sourced wherever possible.

Where possible, products which use recycled materials will be sourced in preference to non-recycled products. Preference will also be given to products that minimise packaging and have a low environmental impact in their manufacture, use and disposal. The project will continue to develop and implement its green housekeeping policy (attached at **Annex C**).

#### ***Other services***

The Burrow will also provide additional free services to the community. These will include:

- A Community information point, including a notice board advertising local services, facilities, events and training information
- A prescription collection point
- A book exchange
- Internet access & IT support (further details below)
- Cash back (through shop transactions)
- A home delivery service

In partnership with local businesses, the Burrow will also act as a drop-off and collection point for the following commercial services:

- Parcel holding

- Dry cleaning
- IT training
- Fax, scanning and copying service

### ***Open access IT facility***

The project will provide two open access hard wired computer terminals providing opportunities for both young and old to access the internet, send e-mails and develop new skills and confidence in information technology. Such IT skills are particularly relevant in such a deeply rural setting. A wireless connection capability will also be provided through a group server enabling the temporary connection of laptops to the IT network for group training sessions or personal internet access. The IT installation will also include a digital projector and screen to enable video conferencing, IT training and distance learning etcetera.

During the first year of operation evening IT training sessions will be developed. Subject to demand, these will cover basic computing skills, internet use and e-mails as well as more advanced uses such as digital photography. We are currently in discussion with Okehampton Age Concern regarding the provision of IT training for retired people and intend to work with Age Concern and other community training organisations to provide appropriate training courses.

## **4.2 Operating Hours**

The shop will operate from 8am to 7pm on weekdays with more limited opening on weekends. As demand is assessed, these hours may be adjusted. The Post Office will operate during the full retail hours. The café will operate on more limited times, initially from 9-5pm week days 10-2 Saturdays. The meeting space will also be available for booking outside shop trading hours.

### ***Use of building outside operating hours***

The café area of the building will be available to local groups to hire for use outside trading hours. The café area has limited capacity and this service is not intended to compete with the village hall as a venue for events. The shop manager will be responsible for managing venue bookings. Additional information on the use of the community space provided by the project is provided in **Annex K**.

## **4.3 Users and Beneficiaries**

The population of the parish of Exbourne and Jacobstowe is 535. The village of Sampford Courtenay, one and a half miles east of Exbourne has now lost its small, part-time Post Office and did not have a shop, while the villages of Sampford Chapple, Broadwoodkelly, Monkokehampton and Honeychurch have neither a shop nor Post Office. These communities have a combined population of 936. It is likely that many residents of these communities will also regularly use the facilities provided by this project in Exbourne, raising the catchment population to 1,471 (see Table overleaf). Already the temporary shop regularly attracts residents from these outlying villages, as well as the small towns of Hatherleigh and North Tawton.

Additionally, there are significant numbers of people who come to Exbourne from outside the catchment area on a daily basis. These include staff at the school and garage, together with many pupils and their parents, some two thirds of whom come from outside the parish. Many of these are also likely to make use of the shop and cafe on a regular basis. The temporary shop already benefits from customers from the garage at Exbourne Cross, who are able to use the café and shop facilities whilst waiting for their vehicles to be repaired.

Further trade will be provided through holiday makers staying in the area, day visitors, including ramblers and cyclists, and passing trade from the A3072 Hatherleigh-Crediton road.

<b>Market Distribution</b>	<b>Population</b>	<b>% Use</b>	<b>Customers /week</b>
Exbourne & Jacobstowe	535	60	321
Monkokehampton	135	20	27
Sampford Courtenay	549	10	55
Broadwoodkelly	252	5	13
Passing trade	-	2	20
Tourists and visitors	-	1	10
Local business and school	-	2	30
<b>TOTAL</b>	<b>1471</b>	<b>100</b>	<b>476</b>

The other major beneficiaries of this project are local producers. We estimate there are some 16 within the parish alone and considerably more within a 30 mile radius. Market research of customer needs has been carried out. A summary of the most recent survey, undertaken in December 2004, is included in **Annex A**. Letters of support from local producers are included in **Annex D**.

## **5 A SUSTAINABLE COMMUNITY FACILITY**

### **5.1 Tackling Physical Barriers**

The new Burrow building is located on a level stretch of road in the centre of the village. A copy of the design is included at **Annex E**. Access to the building will be off an existing footway. Dropped kerb access points will be provided at locations agreed with the Highways Authority to facilitate access for wheel chair users onto the footway. From the footway there are no changes of level, steps or ramps into the building to impede wheelchair users.

The entrance door will be fitted with appropriate controls for automatic opening. The building is single storey and will provide good access for wheel chair users throughout. A single toilet will be provided for staff and customer use which will be wheel chair accessible.

For very elderly or house bound members of the community, a local delivery service will be established with a telephone or web based ordering system.

### **5.2 Tackling Social and Economic Barriers**

EJCAL has an equal opportunities policy in place (see **Annex C**) and is committed to providing a facility that is accessible and welcoming to all.

To ensure that as many members of the community can benefit from the service, it is intended to open at 8am and to stay open until 7pm on at least three evenings per week. More limited opening hours will be in place on Saturdays and Sundays.

We recognise that as a community enterprise, pricing policy and product range must reflect the needs of low income households.

To ensure that the building and services provided will be open and accessible to anyone wishing to participate, and that barriers to participation are avoided we will provide diversity training for all workers and committee members. We will also design and implement appropriate consultation techniques for specific groups including young people, women and migrant workers as part of our annual cycle of evaluation. Section 8 provides details of monitoring and evaluation policies.

### **5.3 Minimising Environmental Impact**

The proposed building is designed to operate highly efficiently. Energy requirements will be minimised through high levels of insulation and the provision of a geothermal heat pump to provide space heating and hot water. The design provides for good levels of natural light and ventilation. Light fittings will be provided with energy efficient bulbs and sensors.

Research from other community shops has shown the operation of freezer and chiller units to be the main consumer of energy. We intend to minimise energy consumption for this purpose by integrating the geothermal heat pump with the refrigeration system to capture waste heat to provide hot water and transfer surplus heat externally in the summer or re-use internally for space heating in the winter.

Water consumption will be minimised through use of sprinkler taps and low flush toilets. Surface water will be disposed of to soakaways.

The provision of everyday household food and goods within the shop is expected to reduce the need for local residents to travel to larger centres and shops. This combined with the sourcing of local produce is expected to reduce car use and food miles.

### **5.4 Networking**

We will develop new and existing links to other community enterprises both locally (eg Sheepwash, Spreyton, Tallaton, Silverton, Sandford) and further afield to share experiences

of best practice and develop, where appropriate, shared supply chain sourcing. We will also give high priority to assisting other communities who wish to establish similar enterprises of their own.

### **5.5 Adapting to New and Emerging Community Needs**

The changing needs of the community will be identified through our monitoring and evaluation processes and the services provided will be adjusted accordingly.

Although the new building occupies a restricted site with little opportunity for expansion the open plan design allows for flexibility and changes to the internal layout if required. Further details are provided at **Annex E**.

## 6 PROJECT MANAGEMENT

### 6.1 Human Resources

The project will employ a full time manager and part time assistant to run the shop and café assisted by a team of volunteers. The manager will report to a delegated member of the management committee. The shop manager will develop, maintain and execute procedures for:

- Stock selection, replenishment levels and purchasing
- Management of part-time assistants and volunteers
- Volunteer rotas
- Security of takings and cashing-up procedures
- Health, safety and hygiene
- Shop procedures
- Training

A copy of the job description for the manager is included at **Annex G**. A part time paid shop-assistant will be employed, initially for 10 hours per week, rising to 15 hours per week from year three onwards.

#### **Recruitment**

Staff will be recruited by advertising in the local press, parish magazine and on notice boards in various public buildings and institutions in the locality. Posts will also be advertised on our website. Application forms, job descriptions and person specifications will be available by telephone or writing from the Company Secretary, or by downloading from the website. A recruitment and training budget of £500 has been included in the initial start up costs.

#### **Volunteer resources**

Volunteers will work in shifts. The total number of shifts for helping in the shop is estimated at 25, based on a 60 hour week divided into 15 three and a half hour shifts and 10 further three and a half hour shifts to provide cover at busy times. Additional volunteers will be required to provide assistance with cleaning, odd jobs and general maintenance. The shop manager will be responsible for the management of volunteers and for drawing up rotas. One existing member of the Association is a highly experienced marketing consultant who will be in charge of all marketing and publicity.

A team of 35 volunteers already provide assistance with the temporary shop by baking cakes, serving and helping with setting up and dismantling. This demonstrates the level of commitment and availability of volunteers which already exists. See Table 3.1 for an assessment of the time and value that shop volunteers have already contributed to the project. A table of hours that volunteers will give to the new shop is set out in **Annex F**.

#### **Training**

We are fortunate in having members of the management committee with retail experience including catering. However, further practical advice and training may be required in the following areas:

- Small business management & control
- Cash management
- Display and marketing
- Health, safety and hygiene
- Customer service
- Security

The shop manager may require similar training for some aspects of the retail operation. Additional training may be needed in the management of volunteers.

Training will also be provided to all volunteers. Such training will include health and safety, environmental health and food hygiene awareness, and shop processes and procedures.

## **6.2 Management and Operation of Post Office Services**

The Post Office operation will be the responsibility of EJCAL under the guidance of the North Tawton Sub-Postmaster. Arrangements with the sub-postmaster will be formalised with the help of the Post Office's advisers.

## **6.3 Management of Shop, Café and Other Services**

EJCAL will be responsible for the operation of the shop, café and other community functions. The management committee will be responsible for the appointment of all paid staff, freelance workers and consultants.

The shop manager will be responsible for the management of shop assistants and shop volunteers and will report on a day to day basis to a delegated member of the Management Committee who will in turn report on a regular basis to the Management Committee. The shop manager will be responsible for the management of all services provided within normal operating times and the booking system for out of hours venue hire.

A delegated committee member will be responsible for management and promotion of IT training sessions and other organised activities outside normal operating times.

The staff management structure is summarised in **8.4 & 8.5 (Page 26)**

## **6.4 Financial Management**

The existing Treasurer, Sally Kenealy, will be responsible for the management of project finances. Sally has considerable financial experience having worked at a senior level with HM Revenue & Customs, and will work closely with EJCAL's accountants. Book-keeping will be provided by a named volunteer.

A budget sub-committee will be set up at least six months prior to the commencement of trading and will set budgets for the coming year. The budget sub-committee will comprise the Chair, Treasurer and one other member of the management committee. Once the budget has been approved revised cash flow projections will be produced by the treasurer. Finance management reports will be produced by the Treasurer for the Management Committee on a monthly basis initially, reducing to quarterly as the trading operation becomes established.

Annual accounts will be prepared by a chartered accountant for presentation to the Annual General Meeting. In the first two years of operation we have budgeted for an annual audit of the business by external consultants.

## **6.5 Management of Existing Temporary Shop and Cafe**

The existing temporary shop was managed entirely by volunteers for six years. However, in January 2008 EJCAL received funding for a part-time shop manager (Reaching Communities Grant). The current shop manager has considerable retail experience and manages all aspects of the temporary shop, including volunteers. The manager reports monthly to a designated member of the shop sub-group, which meets regularly to discuss progress. A delegated member of the shop sub-group reports regularly to the Management

Committee. A simple procedures handbook has been developed as a guide for volunteers. The shop manager is also currently developing the existing procedures and policies, and has widened the range of local products currently on offer in the temporary facility (see **Annex B**).

## **6.6 Policies**

EJCAL already has in place the following policies, copies of which are included in **Annex C**:

- Equal Opportunities Policy
- Child Protection Policy
- Green Housekeeping Policy

The following policies will need to be developed in detail for the operational phase of the project:

- Financial Controls
- Building management and security
- Safety and Hygiene
- Retail operation
- Personnel – including recruitment, training and staff appraisal

The Community Shop Staff Handbook, published by Urchfont Community Shop in association with ViRSA, will form the basis for the above policies and will be adapted in relation to our own particular circumstances. The management structure is shown in **Annex B**.

## 7 PROJECT COSTS

### 7.1 Value Added Tax (VAT)

EJCAL will register for VAT prior to the commencement of the construction phase and will therefore be able to recover VAT on the construction and operational costs. VAT is therefore not included in these costs, except for a proportion of professional fees expended during the development stage prior to VAT registration.

### 7.2 Capital Costs

Capital costs are shown below and include the following:

- Lease agreement with landowner
- Legal fees (based on a detailed solicitors estimate)
- Professional fees
- Architect fees
- Quantity surveyor and planning co-ordinator fees
- Mechanical and electrical engineering consultant. The estimate for this is based on 12% of installation costs (£22,365)
- Building construction (estimated by quantity surveyor in November 2007 and updated April 2009)
- Inflation (construction costs are adjusted for the 4<sup>th</sup> quarter of 2009)

#### Capital Costs

##### Site acquisition

Lease (agreed with landowner)	20,000	
Legal fees	1,500	
<b>Sub-total</b>		<b>21,500</b>

##### Fees/consents

Architect fees	6,831	
QS fees	4,850	
Planning co-ordinator fees	1,900	
Mechanical & electrical engineering fees	2,500	
<b>Sub-total</b>		<b>16,081</b>

##### Building construction

Sub structure (excavation/disposal)	59,940	
Frame	8,050	
Roof	42,950	
Ext Walls	3,370	
Ex windows / doors	11,675	
Interior walls	1,560	
Interior doors / screens	2,000	
Finishes	14,450	
Fittings	8,850	
Sanitary ware	1,675	
Disposal	340	
Mechanical	14,020	
Electrical	8,345	
BWIC	680	
External works	11,485	
Drainage	6,710	
External services	4,810	
Preliminary costs	30,500	

<b>Sub-total</b>		<b>231,410</b>
<u>Shop fitting</u>		
Refrigeration	7,000	
Catering/kitchen equipment	5,000	
Shelving and display units	3,000	
Loose furniture and fittings	2,000	
Shop/office equipment	1,000	
IT inc. computers, server, printers	5,000	
Post Office equipment	5,000	
<b>Sub-total</b>		<b>28,000</b>
<b>Total Capital Costs</b>		<b>£296,991</b>

### 7.3 Revenue Costs

Revenue costs, summarised below, comprise initial start-up costs; recruitment & training; advertising; launch event; and administration and running costs.

#### Revenue Costs

##### Start-up costs

Recruitment of shop staff & training	500	
Printing, advertising	1,000	
Launch event	500	
Licensing/ inspections	500	
Initial Stock purchase	11,000	
<b>Sub total</b>		<b>13,500</b>

##### Operational costs (figures for first year)

Staff costs	19,730	
Fixed costs	13,410	
<b>Sub total</b>		<b>33,140</b>

<b>Total Revenue Costs to end 1<sup>st</sup> operational year</b>		<b>£44,640</b>
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### 7.4 Project Funding

The project has been successful in securing a number of key grants and these, together with current funding shortfalls, are shown in the table overleaf.

## Funding Sources

FUNDER	VALUE (£)	STATUS
<b>Public Sources</b>		
Devon County Council	50,000	Confirmed
CORE	20,000	Confirmed, subject to approval of loan of £20k Revenue from Cooperative & Community Finance. Approved.
West Devon Borough Council	5,000	Confirmed
Exbourne with Jacobstowe PC	100	Received
Low Carbon Buildings Programme	7,000	Re-applying due to time lapse
Greater Dartmoor LEAF <sup>2</sup>	50,000	Confirmed
West Devon Borough Council	8,000	To be applied for
Reaching Communities	40,000	To be applied for
<b>Charitable trusts, companies &amp; other private sources</b>		
Bernard Sunley £10k	10,000	Applied for.
The Links Foundation	20,000	Applied for
Normans Family trust	250	Received
West Devon Environmental Network (Westden)	250	Received
Viscount Amory Trust	1,000	Confirmed
Tudor Trust	15,000	Confirmed
Trusthouse Charitable Foundation	11,500	Applied for
<b>EJCAL local fundraising; shares, donations and shop sales</b>		
Funding currently raised	43,481	Raised
Additional funding to be raised	15,410	To be raised
<b>TOTAL</b>	<b>296,991</b>	

It is a condition of CORE funding that we also take out a loan of £20,000 from Co-operative and Community Finance. This sum is to be used as a source of finance to be repaid over a four year period. Loan terms have yet to be agreed with the lender but it is anticipated the interest will be 8 per cent.

Current Shop Revenue Accounts for 2009, together with the first three years profit and loss accounts are shown in **Annex H**.

<sup>2</sup> Further to this successful application, WDBC have indicated their willingness to provide an additional grant of £8,000 subject to confirmation of an as yet unspecified amount of funds from other sources.

## 7.5 Marketing and Communications Strategy

The marketing for this project has begun. Publicity that has already been generated means that people know there is an unusual and exciting community shop being developed in Exbourne. We have already achieved national radio coverage, but the main thrust of the strategy involves the launch of the new outlet, together with ongoing publicity. A marketing plan is being devised in-house to ensure the shop is well-known and widely advertised. Full details are shown in [Annex I](#).

## 8 MONITORING AND EVALUATION

Monitoring and evaluation procedures have been drawn up to cover both the construction phase and the operational phase of the project. The procedures for each stage of the project are outlined below.

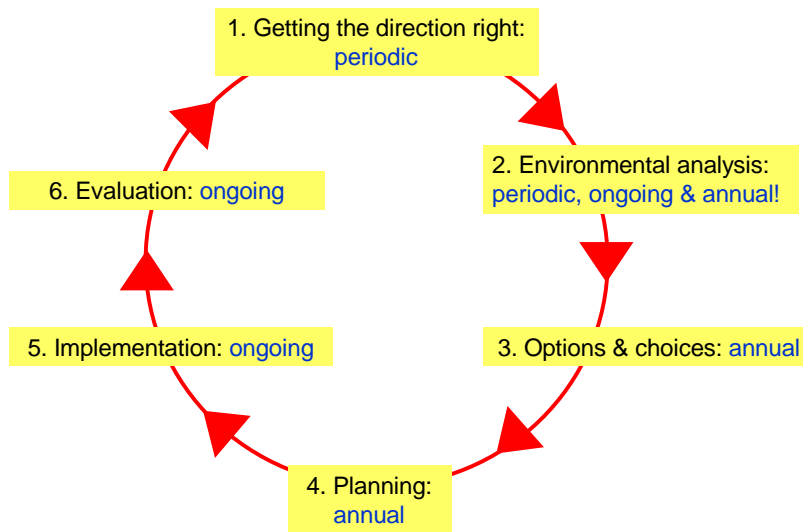
### 8.1 Construction Phase

The table below shows the actions to be taken at each stage of the build project.

STAGE	ACTION
Programme	Monitor progress against project delivery time line and contractors programme Identify critical path and monitor Monitor valuations against project cash flow estimates
Build Quality	Design and contract administration to chartered architect in accordance with RIBA/ RICS contract guidelines Obtain BREEAM 'Very good' certification and Building Regulations approval prior to tender issue Regular inspection by architect and local authority Building Control Obtain warranties for specialist work items
Materials sourcing in accordance with sustainable building standards	Check specification includes details of standards and appropriate sustainable and local sourcing Obtain certificates from contractor confirming supply from specified sustainable sources
Cost	Financial control by Quantity Surveyor against tender prices and cash flow projections

### 8.2 Operational Phase

Monitoring, evaluation and reviews of progress against our strategic objectives will be an integral part of the strategic planning cycle undertaken by the EJCAL Management Committee. Key steps in this process are illustrated in the model below:



### 8.3 Outcome Assessment

An outcome assessment process will be designed and implemented following advice and training of two directors, to be provided by the local branch of CVS. This tool will establish “baseline” indicators of a quantitative and qualitative nature for each of our strategic objectives at the start of the operation of the Burrow. Indicators will also be chosen which will help to measure a range of short, medium and long term impacts. These indicators will be re-visited on a regular basis; some annually, some more regularly, and some on an on-going basis. The process and collection of data will be undertaken by a task group comprising of the shop manager, two supportive volunteers and two Committee Members. The results will be reported back to the Management Committee on a quarterly basis, who will then devise any action plan necessary to mitigate negative trends and build on the successes.

### 8.4 Financial Monitoring Procedures

The Management Committee will ensure that financial management systems are in place to enable them to monitor budgets, income and expenditure and cash-flow against that forecast in the operational business plan. The Treasurer and shop manager will be responsible for day to day financial management, together with regular reports to the Management Committee. The shop manager will similarly be responsible for stock management. We anticipate that the collection of data to support these tasks will be greatly facilitated through the use of specialized point of sale software, which will be developed with advice from ViRSA.

### 8.5 Monitoring and Evaluation Roles

Regular monitoring, evaluation and adjustment tasks will be undertaken by Committee members with the relevant skills and experience, together with the shop manager. Progress on these issues will be reported to the full Management Committee on a quarterly basis, or as required. We anticipate that these delegated tasks will include:

- Liaison with and reports to funders.

- Staff support (paid and volunteers). Evaluation will include assessment of training needs, personal development plans, induction and appraisal processes.
- Legal duties and licenses including health and Safety and food hygiene.
- Premises licenses for the sale of classified goods (tobacco, alcohol and lottery tickets).
- Environmental performance including purchasing policy, waste management, energy efficiency and the development of local produce networks
- Stakeholder Participation Plan. This will provide our framework for the outcome assessment process, customer satisfaction feedback and influencing strategic bodies.

### **8.6 Stakeholder Participation Events**

A range of tools will be designed and implemented to reach all stakeholders and encourage a two way flow of communication, providing opportunities for stakeholders to influence the services and products that the project provides. These will include:

- A 'Burrow Birthday Event'. All beneficiaries and external stakeholders (local authorities, specialist advisors, funders, politicians, suppliers etcetera) will be invited to join this celebration
- Annual General Meeting. The EJCAL Ltd AGM will be open to all members and the broader community. As well as the formal business of the AGM, including democratic election of Management Committee, the agenda will include an open forum discussion where anyone can raise issues of concern or ideas for improvement.
- EJCAL Website. [www.theundergroundshop.co.uk](http://www.theundergroundshop.co.uk) will host an open forum and confidential messaging facility for anybody to post their comments or messages to the Management Committee.
- Customer Satisfaction Questionnaires. These will be distributed via our newsletter and the parish magazine and through a range of local outlets to encourage local people and visitors to express their opinions.
- Suggestions box. A box will be sited in the shop foyer and café area to encourage spontaneous expressions of interest from our beneficiaries and customers.

### **8.7 External Evaluation**

The Management Committee feel that it is important for the confidence and credibility of the organisation to engage external objective assessors to evaluate the project. This will be achieved by a two pronged approach:

1. By enrolling with a Quality Assurance Kite Marked package, such as the 'HallMark' scheme run by the Community Council of Devon, designed specifically for multi-use community buildings. We intend to enrol in this scheme during the first year of operation.
2. To employ a consultant to undertake a review and evaluation of the whole project. This will be undertaken on a two yearly basis and will provide detailed information to enable the business plan to be continually monitored and updated.

### **8.8 Risk Monitoring**

A risk analysis and risk register is included at **Annex J**.

## **ANNEX A**

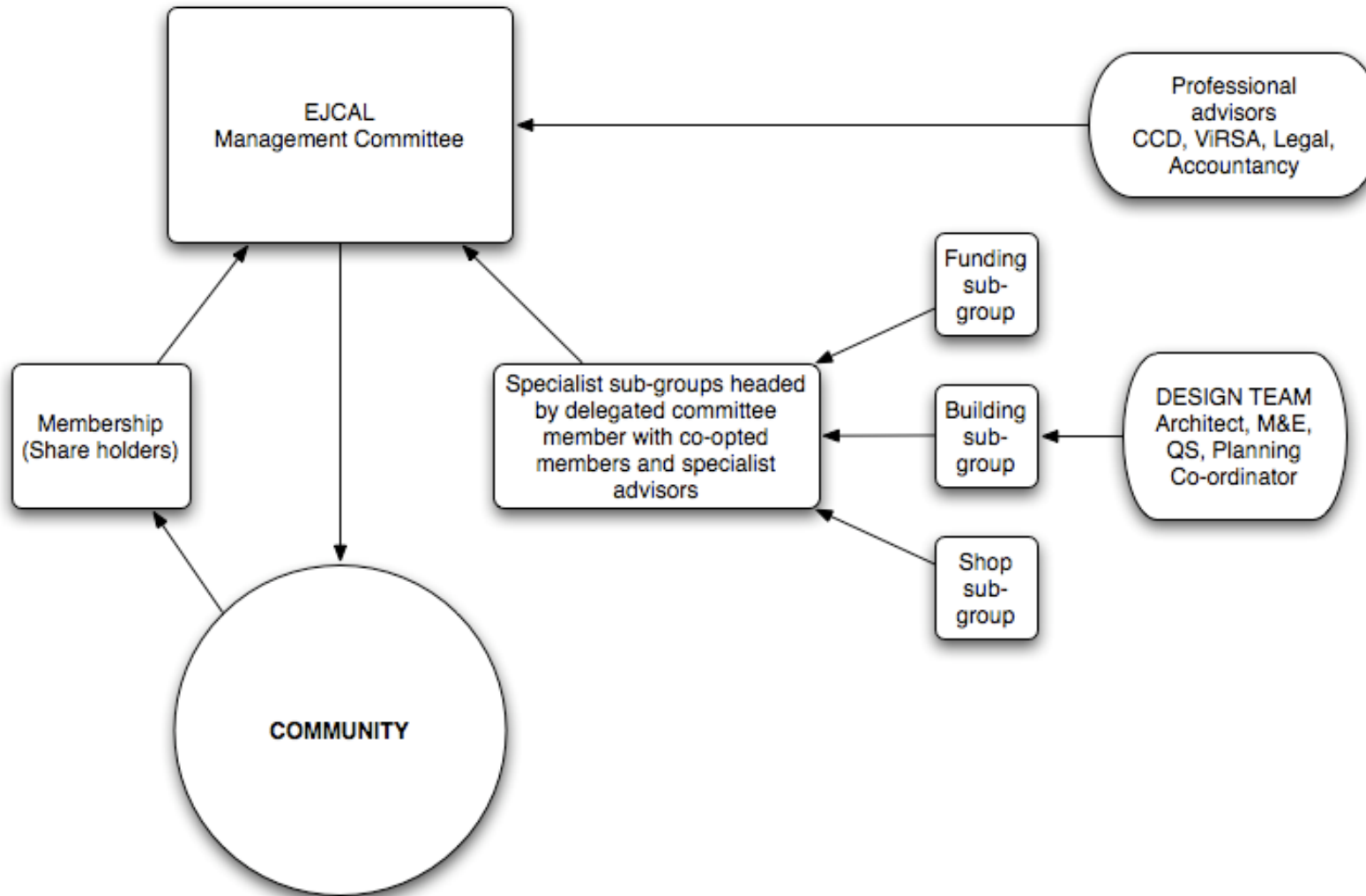
### **Market Research**

**Hard copies available on request.**

## **ANNEX B**

### **Organisational Structure and Project History**

## EJCAL Management Structure



## Organisational Structure

Following the closure of the Exbourne shop and post office a committee was formed in late 2001 to re-establish the facility within the village. In September 2003 this became the Exbourne and Jacobstowe Community Association Ltd (EJCAL), a formally constituted body which is registered as an Industrial & Provident Society and is applying for charitable status<sup>3</sup>.

This legal structure provides us with an incorporated form which enshrines our founding aspirations of community ownership, democratic governance, re-investment of surpluses for community benefit and an asset lock. EJCAL Ltd is registered with, and externally regulated by, the Financial Services Authority. A full copy of our governing document (Rules) is included with this document.

The purpose and 'object' of EJCAL is stated in the rules and extracted below:

*'For the benefit of the Community to sustain, encourage, provide, facilitate or resuscitate village retail enterprises and in particular shops, public houses and garages, including the acquisition of land, construction, improvement, alteration or adapting of buildings or dwelling houses and any other functions ancillary, supplemental or incidental to such objectives.'*

Membership is open to anyone resident within the community, through the purchase of a £20 share. The liability of members is limited to the value of their share stake. Members are entitled to vote in the election of committee members and to have a say in the running of the Association.

## Management Committee

EJCAL is run by a management committee comprising eight members of the Association. Smaller task groups comprising people with relevant skills and interests are established as and when needed with specific delegated roles. In the current development phase there are four working parties responsible for:

- Capital fundraising planning
- Development of the new building
- Management of the temporary shop
- Local fundraising

Members of the working parties are drawn from the management committee, other community volunteers and representatives of advisory organisations. The working parties report to the Management Committee.

The current management committee (elected in June 2009) bring a broad range of pertinent skills, interests and representation to the governing body. They are:

### Marie Winckler

Chair: Committee member since June 2007. Capital Fundraising sub-group.

#### *Qualifications and Experience:*

Retired member of the Senior Civil Service whose relevant experience includes HR Director, major project management and delivery, grant programme management, policy development and information and financial management. Marie has considerable experience of working with local authorities and worked with local farmers when on secondment to DEFRA as Regional Operations Director during the Foot and Mouth outbreak.

### Hugh Hordern

Vice-chair: Committee member since June 2006. Local Fundraising sub-group.

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<sup>3</sup> If we are successful with our application for charitable status, this opens access to a new range of funders and increases the value of donations.

*Qualifications and experience:*

Farm manager (now retired) responsible for 3,000 acre estate. Experienced in all aspects of business including finance, purchasing and sales and personnel management. Set up and ran training group to cover all aspects of agricultural work.

Sally Hordern

Company Secretary. Founder member. Shop management and Fundraising sub-groups.

*Qualifications and experience:*

Retired. Past experience; Secretary/bursar in a small prep school, keeping all accounts and preparing accounts for audit. Staff appointment and management. Payroll management. 10 years working on fundraising side of NSPCC. Voluntary work includes being a case worker for SSAFA. Currently responsible for overall management of temporary cafe/shop. Line Manager of temporary Shop Manager. In charge of daily accounting and banking.

Frank Glanville

Founder member. Development of new building sub-group

*Qualifications and experience:*

Local farmer. Runs several different businesses including two farms, residential and holiday lettings and transport and haulage of light goods. Parish Councillor.

Sally Kenealy

Treasurer. Committee member since June 2009. Local fundraising sub-group

*Qualifications and experience:*

Recently retired Senior Civil Servant. Deputy Director Large Business Services at HMRC.

Kevin Newberry

Committee Member since February 2009. Horticultural Adviser

*Qualifications and experience:*

Horticultural Manager of Easterbrook Farm. Easterbrook Farm is two and a half miles from Exbourne, run for the benefit of mentally/physically disabled young adults.

Keri Quertier

Committee member since June 2009. Capital fundraising sub-group

*Qualifications and experience:* BSc Hons. Heritage Conservation (Landscapes)

Temporary part-time shop manager 2008/2009

Civil Servant with HMRC – VAT consultant. Latterly extensive retail experience.

Other key roles are carried out by:

Dr Claire Kelly – Founder member, past Chair – Communications officer (non-committee post). Experienced community project officer for European funding stream. PhD thesis focussed on the effectiveness of public/private sector partnerships. Experienced in theory and practice of project evaluation.

Claire Hariades – Local Produce Co-ordinator (2005-6). Organises local growers' co-operative and maintains project links with regional/national food initiatives (SPAN etc.).

Chris Hariades - Chartered landscape architect and project manager currently working for local authority. Heads building development group. Development, management and delivery of large regeneration projects including financial and administrative control, reporting to funders, community consultation, liaison with statutory authorities, development of consultancy briefs and contract documentation, appointment and supervision of consultants and contractors. Future role: to take responsibility for appointment and management of consultants for the capital build.

Paul Ankcorn – Founder member. Membership Secretary. Part-time sub-Post Master.

Lisa Attfield - Shop Sub-group. Experience in large scale retail management – produce buyer and shop floor designer. Now runs own organic vegetable farm.

Maggie Brady – Local Fundraising Group. Retired organiser in International Department, Head Quarters of the Scout Movement – overseeing scouts' secondments to overseas projects, Scout Venture and Explorer Belt. Long experience in entertainment field.

### **EJCAL's track record: projects and activities delivered to date**

Exbourne and Jacobstowe Community Association Ltd (EJCAL) have been working to re-establish a permanent community shop and Post Office in Exbourne. As part of this work it has engaged in the following activities:

In March 2002, with the assistance of the Okehampton sub-postmaster, a temporary post office was set up in the village hall on Monday and Friday mornings of each week. To complement this EJCAL established and runs a café supplying light refreshments and a shop selling locally grown produce and basic goods. This operates alongside the outreach post office service.

Establishment and development of our Local Produce Initiative, including the employment of a Project Co-ordinator.

Establishment of a local growers' network, supplying the temporary shop with fresh fruit and vegetables.

Local Producers' Directory compiled.

Organising regular community produce markets.

Development of plans for creation of a new shop/ café/ Post Office in Exbourne.

Fundraising activities in support of the proposals including:

- Raising funds through revenue from the temporary shop and café.
- Raising investment funding through sale of shares to individuals.
- Fund-raising and community events eg Open Gardens, Big Local Breakfasts, harvest suppers, Winter Warmer Soups and other seasonal food-related activities
- Developing skills and strategy for funding applications to external organisations.
- Communication to inform and update members and the local community including regular newsletters, the creation of the project website [www.theundergroundshop.co.uk](http://www.theundergroundshop.co.uk)
- Corporate identity established (our Mole) for The Burrow.

### **The Burrow Project: The Story So Far**

December 2001: The project was triggered by the closure of the privately owned Exbourne shop and post office. Shortly after the closure a public meeting was held which showed an overwhelming demand to re-establish the facility. A questionnaire was drawn up by the newly established committee (now EJCAL) and distributed to all households in the parish. A response rate of 81% was received of which 93% stated clearly their support for re-establishing a shop and post office in the community (Appendix 1).

March 2002: Interim Post office, shop and cafe opened 2 mornings per week in the Village Hall. – ongoing until The Burrow is opened. Since August 2009 open on Wednesday afternoons.

December 2002: An independent feasibility study carried out with a response rate of 60% reported that 85% of respondents would use the shop, 91% would use the Post Office and 63% would use the café. A key part of the feasibility process was to appraise the options in terms of site location and type of accommodation needed to meet the community's aspirations and to be financially viable. (Please refer to the summary of this Options Appraisal , at the end of this annex, the conclusions of which remain consistent and have led to our pursuing this Burrow project proposal as the best possible solution to our community's needs and aspirations)

July 2005: EJCAL awarded a grant of £12,000 plus consultancy support from Defra's Enterprise 4 Inclusion action research programme. These were used to help with the challenges and costs of the early development phase.

December 2004: EJCAL carried out an updated and more detailed market research based on a questionnaire and interview with every household in the Parish, which again demonstrated very high demand for a full time shop, Post Office and café, ranging from 86% for the Post Office through 75% for "fresh local vegetables" to 65% for the Café. Further details of this research may be found in Appendix 3. The research shows also that there is demand for longer opening hours from those who work during the day.

April 2005: This project is a key proposal included in the Parish Plan published in spring 2005. The recommendations state: "The Community Association should continue to pursue the proposed dedicated Post Office, shop and café. A further recommendation was for the provision of 'an area for the display and sale of locally produced arts and crafts'<sup>4</sup>.

September 2005: May 2006: Local Produce Initiative established with grant from Carnegie Trust (UK) enabling a temporary project officer to be appointed for 10 hours per week.

April 2006: Full planning approval obtained for new, purpose built premises in village centre.

March 2006 applications for grant-funding made to various bodies.

March 2007 successful at Stage 1 for Big Lottery Community Buildings. Development Grant of £14,473. Not successful at Stage 2 due to oversubscription by £10 million.

January 2008 awarded Reaching Communities Grant (Big Lottery) £13,976. to employ a Part-time Manager to run temporary shop and increase customer base and suppliers of local produce. Grant ended 14<sup>th</sup> August 2009.

July 2008 Stage 1 application to Local Food Grant accepted. Stage 2 unsuccessful

October 2009 awarded Grassroots Grant £5,000. to continue employing Part-Time Manager in temporary shop.

December 2009 Tudor Trust Grant confirmed. £15,000.

February 2010 Devon Rural Renaissance LEAF Grant confirmed £50,000.

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<sup>4</sup> Exbourne with Jacobstowe Parish Plan 2005, recommendations 4.1 and 13.2

## **ANNEX C**

### **Policies**

### **Equal Opportunities Policy**

EJCAL is committed to equality of opportunity in the employment of staff and volunteers and in the service it offers to its customers regardless of their race, gender, marital status, sexual preference, age, religious belief, ethnic origin, nationality, colour or physical or mental disability.

### **Procedures and Practice**

1. Every employee, volunteer and Committee member has a personal responsibility for the implementation and compliance with this policy.
2. EJCAL will seek to ensure equality of opportunity and treatment for all people in the course of its activities.
3. EJCAL will take appropriate measures to ensure that members of its Committee and its staff and volunteers have an understanding and awareness of the meaning and effects of discrimination.
4. EJCAL will ensure that all local residents are aware of its services and products and that they have access to the Shop and its services either directly or through a home ordering and delivery service.
5. Publicity material and other information will be available in formats requested by customers to enable them to have equal access to these so far as this is possible.
6. EJCAL will provide appropriate training and support for members of staff, volunteers and Committee members to increase their awareness and understanding of discrimination.
7. EJCAL will ensure that there is no discrimination against any potential members being able to offer their services on the Committee.
8. EJCAL will ensure that the recruitment and appointment of staff and volunteers including job descriptions, advertisements, training, conditions of employment, pay and expenses and other aspects of employment do not directly or indirectly discriminate against any potential or actual employees and volunteers.
9. EJCAL will monitor recruitment and employment procedures for staff and volunteers to avoid discrimination.
10. EJCAL will ensure that staff and volunteers are selected on the basis of their relevant merits and abilities only.
11. EJCAL will actively pursue its commitment to equality of opportunity in hiring contractors and other bodies to undertake work for it.
12. EJCAL will ensure that its procedures for dealing with complaints are brought to the attention of, and dealt with by the Committee.

### **Relevant Legislation**

EJCAL is aware of its responsibilities as an employer for equal opportunities under the following legislation:

- European Convention on Human Rights and the Human Rights Act 1998
- The Disability Discrimination Act 1995
- The Race Relations Act 1976 and Amendment Act 2000
- The Sex Discrimination Acts 1975 and 1986
- The Rehabilitation of Offenders Act 1974
- The Chronically Sick and Disabled Persons Act 1970 and Amendments of 1976
- The Equal Pay Act 1970

- The Disabled Persons (Employment) Acts 1944 and 1958

### **Conclusion and Review**

EJCAL is committed to ensuring that all its employees, volunteers and Committee members make this policy a reality by practicing non-discriminatory behaviour and practice at all times. In this spirit, EJCAL will review this policy and its practices every three years to ensure that it complies with current legislation and good practice.

### **Draft Child Protection Policy**

The Exbourne & Jacobstowe Community Association Ltd recognises as important that it is people who protect and not only procedures. Its aim is to create a culture of informed vigilance at all levels of the organisation by:

- Raising awareness of the issues involved in protecting children involved with the organisation.
- Addressing the needs of children in all their cultural, spiritual, intellectual, racial and physical diversity.
- Supporting those who work with children, encouraging them to work together to follow good practice.

The legal framework for this work is:

- The Rehabilitation of Offenders Act 1974
- The Children Act 1989
- The Human Rights Act 1998
- The Data Protection Act 1984
- The Protection of Children Act 1989

The EJCAL Management Committee recognises that it has a primary duty of care to ensure the well being of children and young people whilst they are in the care of the organisation.

This organisation recognises and seeks to follow the guidance set out in the Home Office Code of Practice titled "Safe from Harm" published in 1993. (Summarised in Annex 1)

The Committee appoints a coordinator responsible for working with it to implement the Child Protection Policies and Procedures. The coordinator will ensure that any concerns about a child or the behaviour of an adult are reported to the statutory agencies. (Contact numbers Annex 2)

The ChildLine telephone number is displayed.

The Organisation ensures that the appropriate Health and Safety Procedures are in place for all activities in which children and young people partake.

The Organisation ensures that the appropriate insurance is in place to cover all activities in which children and young people partake.

All those authorised to work with children and young people are appropriately appointed, trained and supported. All authorised personnel are supplied with a copy of the Organisation's Child Protection Policy, Procedures and good practice guidelines.

For the purposes of this policy and any associated procedures a child is anyone under the age of eighteen years. All those that work with or are in regular contact with such children must comply with this policy, this includes all paid and volunteer workers.

All those working with or in direct and regular contact with children in a paid or unpaid capacity, including those in a supervisory capacity are carefully recruited and their backgrounds checked to the appropriate level through the Criminal Records Bureau.

The Organisation fully endorses the principle, enshrined in the Protection of Children Act 1989, that the welfare of the child is paramount.

The Organisation encourages a culture of vigilance which takes children seriously.

The organisation takes allegations of abuse seriously, and co-operate fully with local authority Child Protection committees in any matter of concerning the welfare of children and young people. It acknowledges that the prime responsibility of statutory agencies to investigate any significant harm to a child. The organisation will never itself investigate incidents of suspected child abuse.

Paid workers and volunteers must have an awareness of their use of authority and power and never betray the trust given to them.

Where a child makes a disclosure to a member of staff that member

- offers reassurance to the child
- listens to the child, and
- gives reassurance that he or she will take action

The member of staff does not question the child.

Staff will make record a record of any suspicions of abuse or disclosures including:

- the child's name
- the child's address
- the age of the child
- the date and time of the observation or disclosure
- an objective record of the observation or disclosure
- the exact words spoken by the child
- the name of the person to whom the concern was reported, with the date and time; and
- the name/s of any other person present at the time.

These records are signed and dated and kept in a separate confidential file.

All members of staff paid and unpaid know the procedures for recoding and reporting.

Paid and volunteer workers must report any concerns with respect to child protection issues with the Child Protection Coordinator.

Parents are normally the first point of contact. If suspicion of abuse is recorded, parents are informed at the same time as the report is made, unless there are exceptional circumstances. This will usually be in the case where the parent is the likely abuser.

All suspicions and investigations are kept confidential and shared only with those who need to know.

Where a member of staff or a volunteer is dismissed from the Organisation or internally disciplined because of misconduct relating to a child, we notify the Department of Health administrators so that the name may be included on the List for the Protection of Children and Vulnerable Adults.

If a project is undertaken jointly with another organisation an agreement is reached as to which organisation's child protection policy is to be followed.

This policy and its associated procedures will be reviewed at least annually and more often as necessary, for example if a new activity or new government guidance is introduced.

This policy was adopted at a meeting of The EJCAL Management Committee held on.....

Signed on behalf of the Organisation .....

## **Green Housekeeping Policy**

EJCAL will strive for environmental excellence in all aspects of the management of the Community Shop, Café and Post Office.

### **Responsibility**

Responsibility for ensuring that environmental considerations are taken fully into account ultimately rests with the Management Committee but the day to day responsibility for implementing the policy, and for monitoring it, rests with the Shop Manager. All staff and volunteers are required to adhere to this policy.

### **Aims**

EJCAL aims to improve its environmental performance by:

1. Conserving energy, water, wood, paper and other resources which are scarce or non-renewable, while still providing a safe and comfortable working environment.
2. Reducing waste through re-use and recycling and by using refurbished and recycled products and materials where these are available
3. Monitoring discharges and emissions to air, land and water to assess what action is necessary to reduce pollution or the risk of pollution
4. Avoiding the use, or supply of, ozone depleting products and minimising the release of greenhouse gases, vehicle emissions and other substances damaging to health and the environment
5. Seeking to supply environmentally friendly products and services
6. Adhering to relevant legislation and regulations
7. Educating, training and motivating staff and volunteers to work in an environmentally responsible manner and to play a full part in developing new ideas and initiatives improve environmental management
8. Communicating openly with staff and volunteers about environmental policies and best practice and cooperating with others in the public and private sectors to develop and promote environmentally sound practices.

### **Review**

This policy will be reviewed every three years.

## **ANNEX D**

### **Letters of Support and Grants Obtained**

**Hard copies available on request.**

## **ANNEX E**

### **Building Design and Details**

## **ANNEX F**

### **Table of Volunteer Hours**

**Hard copy available on request.**

## **ANNEX G**

### **Manager's Job Description**

## **DRAFT JOB DESCRIPTION MANAGER – THE BURROW COMMUNITY SHOP**

**Job starts:** August 2010

**Salary:** £16,113 pa.

**Terms:** to be agreed

**Background:** The Burrow community shop is an exciting and innovative project, a model community enterprise which is being established in the West Devon village of Exbourne to serve the villages of Exbourne, Jacobstowe, Monkokehampton, Broadwoodkelly, Sampford Chapple, Sampford Courtenay and Honeychurch, none of which has a shop and only one of which has a part-time Post Office. It is a trail-blazing environmental project constructed and operated on sustainable principles, which provides a market for local produce, champions and features local crafts, and supports local people by providing a meeting place and coffee shop for young and old alike. It offers Post Office services, and IT facilities and training for those who do not have such facilities at home.

The Burrow will be staffed by volunteers, including some from local organisations supporting young people who are disadvantaged or disabled in some way. But it will be overseen by a full-time professional manager.

### **Job description and key tasks:**

The Manager will report to a member of the Exbourne and Jacobstowe Community Association Limited (EJCAL), a not-for-profit Industrial and Provident Society which has been set up to establish the Burrow. He or she will be responsible for

- overseeing the set-up and operation of the Burrow, ensuring that it is stocked and planned in accordance with the principles of a sustainable community enterprise;
- managing the rota of volunteers and ensuring that they are properly trained and that the disadvantaged and disabled volunteers are well-used and managed in a way that develops their skills;
- encouraging more local producers and craftspeople to contribute their goods to the Burrow and develop local enterprise;
- ensuring that the Burrow operates in accordance with all relevant regulations including health and safety requirements;
- delivering an operating surplus which can be reinvested to maintain and improve the facilities of the Burrow;
- ensuring that the Burrow is at the heart of community life.

### **Essential criteria:**

- experience of retail management, including staff and financial management
- understanding of health and safety requirements and the importance of complying with them
- commitment to the principles of community enterprise and appreciation of the actual and potential role of the Burrow
- interpersonal skills; the ability to relate to a wide range of people with different needs and manage a team of volunteers
- entrepreneurial enthusiasm
- commitment to the equal opportunities principles of EJCAL

### **Desirable criteria**

- experience of working with young people
- IT literacy
- understanding of local agricultural and other produce.

## **ANNEX H**

### **Shop Revenue Accounts and Three Year Profit & Loss Accounts**

## EJCAL SHOP Profit & Loss Year End 31/12/2009

	9 month Actual	Est for Year
SALES	11058	16058
COSTS OF SALES	7699	10989
TRADING PROFIT	3359	5069
OVERHEADS		
Salaries	4421	5771
(Grants received)	3972	5771
Managers expenses	472	712
(Grants received)	472	472
Hire of Hall	88	231
(Grants received)	11	220
Insurance	499	499
(Grants received)	318	318
Misc inc repairs	160	217
NET SHOP PROFIT	2492	4211

## Projected Year 1 Profit and Loss for The Burrow

A Proposal For a Community Enterprise For Exbourne & Jacobstowe - Year 1 Profit & Loss							
	initial	Mar	annual	Jun	Sep	Dec	Totals
Shop Sales		£9,750		£16,250	£19,500	£19,500	£65,000
Café Sales		£5,000		£6,500	£5,500	£8,000	£25,000
Other Income (Various)		£1,000		£1,500	£1,500	£1,000	£5,000
<b>revenue loan</b>	<b>£20,000</b>						
<b>Total Income</b>	<b>£20,000</b>	<b>£15,750</b>		<b>£24,250</b>	<b>£26,500</b>	<b>£28,500</b>	£115,000
Cost of Sales Shop		£7,500		£12,500	£15,000	£15,000	£50,000
Cost of Sales Café		£2,000		£3,200	£2,500	£3,200	£10,900
initial stock	£11,000						
Total Cost Of Sales	£11,000	£9,500		£15,700	£17,500	£18,200	£71,900
<b>Gross Profit</b>	<b>£9,000</b>	<b>£6,250</b>		<b>£8,550</b>	<b>£9,000</b>	<b>£10,300</b>	£43,100
Manager		£4,100		£4,100	£4,100	£4,100	£16,400
Assistant (after 6 mos)		£0		£0	£750	£750	£1,500
Employers NI		£345		£345	£345	£345	£1,380
Staff Training & Recruitment	£500	£100		£100	£100	£150	£950
Travel		£300		£300	£300	£300	£1,200
Electricity		£750		£750	£750	£750	£3,000
Telephone		£150		£150	£150	£150	£600
Rates		£150		£150	£150	£150	£600
Printing Postage & Stationery		£100		£150	£100	£100	£450
Equipment Purchases		£300		£100	£100	£300	£800
Repairs & Maintenance		£300		£300	£400	£400	£1,400
Cleaning Materials		£90		£90	£90	£90	£360
Insurance/Licencing	£500					£600	£1,100
Marketing/Advertising	£1,500	£150		£200	£200	£450	£2,500
Accountancy/ Legal Fees			£800				£800
IT support		£150		£150	£150	£150	£600
Audit Costs			£400				£400
Bank/loan interest		£400		£400	£400	£400	£1,600
<b>Total Overheads</b>	<b>£2,500</b>	<b>£7,385</b>	<b>£1,200</b>	<b>£7,285</b>	<b>£8,085</b>	<b>£9,185</b>	£35,640
<b>Gross Trading Profit</b>	<b>£6,500</b>	<b>-£1,135</b>	<b>-£1,200</b>	<b>£1,265</b>	<b>£915</b>	<b>£1,115</b>	£7,460
<b>LESS costs met by loan</b>							[20000]
<b>Trading Profit for Tax</b>							<b>12,540</b>
<b>NOTE: Loan Repayment</b>							£4,000
<b>Loan BIce C/Fwd</b>							£16,000

## Projected Year 2 Profit and Loss for The Burrow

A Proposal For a Community Enterprise For Exbourne & Jacobstowe - Year 2 Profit & Loss								
			Mar	annual	Jun	Sep	Dec	Totals
Shop Sales			£13,500		£18,500	£21,500	£21,500	£75,000
Café Sales			£6,000		£7,500	£6,000	£8,000	£27,500
Other Income (Various)			£1,000		£1,500	£1,500	£1,000	£5,000
<b>Total Income</b>			<b>£20,500</b>	<b>£0</b>	<b>£27,500</b>	<b>£29,000</b>	<b>£30,500</b>	£107,500
Cost of Sales Shop			£10,000		£14,000	£16,000	£16,000	£56,000
Cost of Sales Café			£2,000		£3,200	£2,700	£3,200	£11,100
<b>Total Cost Of Sales</b>			<b>£12,000</b>	<b>£0</b>	<b>£17,200</b>	<b>£18,700</b>	<b>£19,200</b>	£67,100
<b>Gross Profit</b>			<b>£8,500</b>	<b>£0</b>	<b>£10,300</b>	<b>£10,300</b>	<b>£11,300</b>	£40,400
Manager			£4,100		£4,100	£4,100	£4,100	£16,400
Assistant			£750		£750	£750	£750	£3,000
Employers NI			£345		£345	£345	£345	£1,380
Staff Training & Recruitment			£100		£100	£100	£150	£450
Travel			£300		£300	£300	£300	£1,200
Electricity			£750		£750	£750	£750	£3,000
Telephone			£150		£150	£150	£150	£600
Rates			£150		£150	£150	£150	£600
Printing Postage & Stationery			£100		£150	£100	£100	£450
Equipment Purchases			£300		£100	£100	£300	£800
Repairs & Maintenance			£300		£300	£400	£400	£1,400
Cleaning Materials			£90		£90	£90	£90	£360
Insurance/Licencing				£1,100				£1,100
Marketing			£150		£200	£200	£250	£800
Accountancy/ Legal Fees				£650				£650
IT support			£150		£150	£150	£150	£600
Audit Costs				£250				£250
Bank/loan interest			£320		£320	£320	£320	£1,280
<b>Total Overheads</b>			<b>£8,055</b>	<b>£2,000</b>	<b>£7,955</b>	<b>£8,005</b>	<b>£8,305</b>	£34,320
<b>Gross Trading Profit</b>			<b>£445</b>	<b>-£2,000</b>	<b>£2,345</b>	<b>£2,295</b>	<b>£2,995</b>	£6,080
<b>Trading Profit for Tax</b>	bfwd	<b>12,540</b>						
	cfwd							<b>6,460</b>
<b>NOTE: Loan Repayment</b>	bfwd	£16,000						£5,000
<b>Loan B/ce C/Fwd</b>	cfwd							£11,000

## Projected Year 3 Profit and Loss for The Burrow

A Proposal For A Community Enterprise For Exbourne & Jacobstowe - Year 3 Profit & Loss								
			Mar	annual	Jun	Sep	Dec	Totals
Shop Sales			£16,000		£21,000	£23,000	£24,000	£84,000
Café Sales			£6,000		£7,500	£6,000	£8,000	£27,500
Other Income (Various)			£1,000		£1,500	£1,500	£1,000	£5,000
<b>Total Income</b>			<b>£23,000</b>		<b>£30,000</b>	<b>£30,500</b>	<b>£33,000</b>	£116,500
Cost Of Sales Shop			£12,000		£16,000	£17,000	£18,000	£63,000
Cost of Sales Café			£2,000		£3,200	£2,700	£3,200	£11,100
<b>Total Cost Of Sales</b>			<b>£14,000</b>		<b>£19,200</b>	<b>£19,700</b>	<b>£21,200</b>	£74,100
<b>Gross Profit</b>			<b>£9,000</b>		<b>£10,800</b>	<b>£10,800</b>	<b>£11,800</b>	£42,400
Manager			£4,500		£4,500	£4,500	£4,500	£18,000
Assistant			£750		£750	£750	£750	£3,000
Employers NI			£400		£400	£400	£400	£1,600
Staff Training			£50		£50	£500	£0	£600
Electricity			£800		£800	£800	£800	£3,200
Telephone			£150		£150	£150	£150	£600
Travel			£300		£300	£300	£300	£1,200
Water Rates			£150		£150	£150	£150	£600
Printing Postage & Stationery			£100		£100	£100	£100	£400
Equipment Purchases			£100		£100	£100	£100	£400
Repairs & Maintenance			£250		£300	£300	£200	£1,050
Cleaning Materials			£90		£90	£90	£90	£360
Insurance				£1,000				£1,000
Marketing			£150		£200	£200	£200	£750
Accountancy/ Legal Fees				£650				£650
IT support			£150		£150	£150	£150	£600
bank/loan interet			£220		£220	£220	£220	£880
<b>Total Overheads</b>			<b>£8,160</b>	<b>£1,650</b>	<b>£8,260</b>	<b>£8,710</b>	<b>£8,110</b>	£34,890
<b>Trading Profit</b>			<b>£840</b>	<b>-£1,650</b>	<b>£2,540</b>	<b>£2,090</b>	<b>£3,690</b>	£7,510
<b>Trading Profit for Tax</b>	bfwd	<b>6,460</b>						£1,050
	cfwd							
<b>Taxation Est @ 20%</b>								£210
<b>NOTE: Loan Repayment</b>	bfwd	£11,000						£5,000
<b>Loan Blce C/Fwd</b>	cfwd							£6,000

### Notes on Projected Profit and Loss

#### Other Income

This includes renting out advertising space, dry cleaning, parcel collection service, out of hours room hire (£10 per evening hire charge) and fund raising events.

#### Inflation

No allowance is made for inflation as costs and income are assumed to be affected equally.

#### Staff time and costs

The figures are based on one full time manager. Additional paid part time support has been costed at £6/hr with no allowance for NI, initially for 10 hours per week. No allowance is made for staff pensions.

No cost allowance has been made for further volunteers of which the temporary shop already has a healthy supply and has offers from others who are not presently able to support the shop because of its limited opening hours.

#### Electricity Costs

Experience from other stores has shown the cost of operating chiller cabinets can be the second largest cost after staff costs. A figure of £3000/ annum has been included to cover electricity but we are also investigating ways of ensuring that chiller equipment purchased is of the highest operating efficiency as part of the design and planning process and so hope to be able to reduce this sum.

#### Telephone

This is made up of fees for a broadband connection, a landline and a mobile

#### Travel Costs

Travel costs are estimated at 50 miles per week at 0.40p per mile.

#### Rates

The estimated rateable value of the shop is £7,000. As a Village community enterprise we are eligible to receive full national non-domestic rate relief for the first 3 years of trading and a reduced rate of 20% subsequently, equivalent to £1,400pa. Water rates are estimated at £600pa based on information provided by South West Water.

#### Bank charges

Charges are based on repayment of a £20,000 loan to Co-operative & Community Finance over a four year term at an anticipated rate of interest of 8 per cent.

#### **Use of Profits**

Any profit generated by the enterprise will be re-invested in the business to maintain and develop the project. Surplus or additional income, after repayment of loans and debentures, will be passed to the Exbourne & Jacobstowe Community Association Limited to be used for the benefit of the Parish through the establishment of a trust fund from year 5 onwards.

## **ANNEX I**

### **Marketing and Communications Strategy**

## **Unique Selling Points**

Marketing will focus on four Unique Selling Points (USPs):

1. The local produce on sale in the shop includes a wide range of dairy products, beef and pork products, eggs, organic vegetables, bread, cakes and savouries. It is all sourced from within a 10 mile radius of the shop, thus reducing food miles. It gives consumers knowledge of where their food comes from and the personalities behind its production which is becoming increasingly important to the majority of consumers.
2. Community service and support through services such as home delivery for elderly/ less mobile, prescription collection, parcel holding, community information point and meeting place.
3. Innovative service operating from purpose-built premises demonstrating use of low environmental impact building techniques
4. EJCAL is very aware of current concerns expressed both nationally and locally about lack of access to both Local Authority and other services in rural areas. By looking to the future needs of this rural community we plan to provide a Village Hub Information point (along the lines already being suggested by the Government) which will enable customers to access a variety of services from a local point without recourse to transport, thereby also reducing carbon emission, another key factor in our project.

## **The Launch**

At the launch we have the opportunity for very wide publicity which will focus on the following:

Advance local leafleting, press releases and advertising

Attract celebrity 'real food' champion to officially open the facility

Use the already well-established links with Radio Devon to seek an outside broadcast

Attract national/ regional newspaper, radio and TV coverage, because of the nature of the build and the facilities and services provided

## **Ongoing Publicity**

We intend to maintain and develop interest and spend by:

- Development of a strong branding image based on the mole logo which has already been developed
- Welcome, quality and value leading to word of mouth promotion
- Regular and changing promotions of local foods and crafts and monthly special offers in the parish newsletter (circulation 1000 homes)
- Regular updates to all members
- Continuing to emphasize the volunteer and community owned values: "It's your shop!" and promoting environmental benefits of shopping locally to the wider community
- Maintain and develop this interest in the project via the website
- Entry into relevant regional and national competitions and awards
- Development of additional services to build the audience
- Defining the volunteer roles to include active promotion when not on duty
- Advertising
- Signing of the facility from the A3072 Crediton Road to attract passing trade
- Encouraging estate agents to add the project to property particulars
- Inclusion in local services listings including tourism publications
- A welcome pack to new residents and holiday lets, explaining the opportunities and services
- Leaflets promoting the village and its shop available at tourist information outlets
- Continuing to generate newsworthy events and issuing press releases

## **Communications**

EJCAL is committed to providing a continual flow of information on project progress and developments through the following means:

- Production of newsletters for the local community and stakeholders
- Inclusion of up-to-date information in the parish magazine
- Reports to Parish Council
- Press releases to inform the wider public of achievements
- Maintaining and updating the website

Our designated volunteer Communications Officer will have responsibility for communications including the issue of press releases and newsletters and the management and update of the website.

## **ANNEX J**

### **Risk Register and SWOT Analysis**

## Risk Analysis

### STRENGTHS

- Committed corps of skilled volunteers generously donating time, energy and money
- Excellent original and potentially award-winning ecologically sound design for building
- Large body of businesses committed to supplying their produce and crafts to the shop
- Multiple community uses possible from building, providing extra income and wide range of community benefits
- Sound business plan
- Support of key local figures including MP
- Substantial funds already raised
- Pro bono advice from professional advisors

### WEAKNESSES

- Timescale vulnerable to funding decisions and delays could sap morale of volunteers

### OPPORTUNITIES

- Original concept can be piloted and shared more widely
- Demonstration of success of low-carbon project can put area on map
- Can develop wider sense of community beyond host village
- Increased spend on healthy local food and crafts

### THREATS

- Originality of concept wears off and ideals are compromised
- Okehampton and other centres improve their facilities and undermine shop's competitiveness
- Post Office refuses to use community shop for its services
- Particular sector of local agricultural economy is hit by disease and suppliers are affected

### Risk Register

Type of risk	Specific Description	Impact	Likelihood	Major risk	Mitigating action
<b>Strategic</b>	Failure to secure major source of funding	<b>H</b>	<b>M</b>	*	None – project will fail if major funder cannot be identified. Funds raised so far will be diverted to other community causes.
	Slippage in funding	<b>M</b>	<b>H</b>		If match-funding suppliers withdraw their offers, project will seek alternative sources of match-funding
	Delays and problems, including construction problems, undermine	<b>M</b>	<b>M</b>		Detailed control of building works by professional manager; continued monitoring of overall situation by

	Business Plan				Committee
	Loss of support in area	<b>M</b>	<b>L</b>		Active publicity and programme of social events to win new friends. Pro-active working with Highways Authority on traffic-related issues
	Overambitious Business Plan	<b>H</b>	<b>L</b>		Continued monitoring
<b>Regulatory</b>	Non-compliance with Health and Safety requirements	<b>L</b>	<b>L</b>		Continuing liaison with local authority Environmental Health department
	Non-compliance with fire requirements	<b>L</b>	<b>L</b>		Continuing liaison with Fire and Rescue Authority
	Additional new burdensome legislative requirements	<b>L</b>	<b>L</b>		Keep up to date with proposed legislative changes and assess impact
<b>Operational</b>	Loss of volunteer support	<b>H</b>	<b>L</b>	*	Continuing replenishment of list, and events organised for existing volunteers to retain support
	Loss of suppliers	<b>M</b>	<b>L</b>		Continual search for potential new suppliers
	Failure of some suppliers to deliver	<b>M</b>	<b>L</b>		As above
	Lack of take-up of community facilities	<b>M</b>	<b>L</b>		Advertise facilities outside immediate area and devise new uses
<b>Financial</b>	Funding less than expected	<b>H</b>	<b>M</b>	*	Active canvassing of alternative and additional funders
	Dishonesty in customers, suppliers or staff	<b>L</b>	<b>L</b>		Supervisory vigilance and rigorous financial controls
	Sales below forecasts	<b>M</b>	<b>L</b>		Review product lines, enhance advertising and consider additional community uses

Action Plan

<b>Threats and Opportunities Identified in SWOT Analysis</b>	<b>Action Arising</b>	<b>Means of delivering</b>	<b>Responsibility</b>	<b>Timescale</b>	<b>Measurement of success</b>
Originality of project	Share experiences with other communities and develop networking opportunities	Continue to work with advisory organisations eg. CCD, ViRSA, Ruby Country Initiative. Establish networking links with other community enterprises in local area and beyond	EJCAL management committee and shop manager	Annual review	Yearly assessment of number of contacts and subsequent outcomes
Increased interest in Exbourne due to shop activity	Promote increase in visitor numbers	Inclusion in tourism listings  Generate newsworthy stories of regional/ national interest  Participation in West Devon Food Fortnight  Enter relevant retail/ community enterprise awards/ competitions	Communications officer Communications officer  Shop Manager  EJCAL management committee	Annual  Quarterly  Annual  As appropriate	Number of media reports No. of listings in tourist/ visitor guides  Monitor customers/ turnover over promotion period No. of awards
Wider sense of community through success of project	Develop sense of local ownership and pride	Regular community bulletins  Provide wide range of community services based to fulfil local need	Communications officer  Management Committee	Monthly  Annual	Production of newsletters/ local press articles Survey In-store Suggestion box
Increase in local produce sales	Target of 30% of sales for local produce	Effective promotion, marketing and pricing Work with suppliers to produce and package	Management Committee Shop Manger	Quarterly review	Trading analysis  Assessment of no. and range of suppliers

<b>Threats and Opportunities Identified in SWOT Analysis</b>	<b>Action Arising</b>	<b>Means of delivering</b>	<b>Responsibility</b>	<b>Timescale</b>	<b>Measurement of success</b>
Originality of concept wears off and ideals not upheld		Maintain interest in project through promotional events and generation of newsworthy stories.  Ensure underlying philosophy of business is clearly communicated and understood.  Links with local groups, school etc	Management Committee & Shop manager  Management Committee and Communications Officer	Annual review	Monitoring of sales, customers and received publicity  Customer/ community survey  Record of activities and achievements
Competition from Okehampton and other villages	Effective marketing  Provide wide range of community services				
Lack of Post Office support	Provide alternative means of delivering post office functions	Explore options for most effective delivery of alternative services  Non reliance on revenues from post-office services within business plan	Management Committee	As required	

**ANNEX K**

**Supplementary Information on Use of Community Space  
Hard copy available on request**