

NEWBOLD HOUSE

Centre for Partnership

Business Plan



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Newbold Trust is a limited company by guarantee with charitable status.
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Letter From the Board

Dear Colleagues,

Newbold House is in a process of deep change, advancing to a more prosperous, enterprising and exciting future of service for both our local Moray and international communities.

For over 3 decades The Newbold House has provided a venue for groups and individuals to learn about and explore their spirituality, values and beliefs, and group dynamics. Although the Trust has managed to keep financially afloat throughout the years it has been a continuous struggle with unsustainable staff burnout and constant financial challenges, despite enriching the lives of many people who have passed through its doors. Furthermore, the Trust's activities have historically been delivered to an international market of workshop-goers, which has dwindled in the present global and economic context.

Our present Board of Trustees have recognised the need to become more enterprising, along with the potential of the Newbold House to become a stronger place-based community resource, both for Moray and the rest of Scotland. We have determined a new direction for the Trust, which includes creating a suite of in-house programmes and community engagement events, and becoming more targeted in the services we provide to our local and international clientele. In order to deliver on this potential, the Board has initiated a rapid change in the Trust's business model, and established new Strategic Objectives for 2020-2023.

As part of this change, we have been gifted with a new and dynamic Managing Director who is an on the ground expert working in community & economic development. He is well-placed to guide Newbold House forward as we develop much desired and needed in-house "*Culture Garden*" programmes for Youth and Communities.

These "*Culture Garden*" programs are a response to the critical moment we believe our world is facing. In this time of mounting and overlapping crises, communities in Scotland and around the globe are urgently seeking ways to become more resilient, engaged, and empowered in order to survive the present and coming upheavals and create a more life-sustaining civilisation in the process. To support this transformation, we believe we must learn (or in some cases re-learn) the culture-building skills which provide the invisible infrastructures for healthy and empowered cultures and communities.

This process, which we call "*Culture Gardening*," is at the forefront of our human evolutionary journey. We believe that the Newbold House is well-positioned to provide this burgeoning movement with a focal point, a language, and a set of evolving best practices. With experienced leadership and facilitators on board, a beautiful venue, and a swiftly growing clientele of communities, and organisations seeking our support, the moment has arrived for us to expand our activities to the local, national and international levels.

For us to achieve this level of service, we are seeking financial support in addition to our regular enterprising income, in order to develop a strong professional staff base, as well as upgrading our wonderful Victorian mansion and our 7 acres of gardens and woodlands.

In our exploration of the market demand for what we are proposing, we have already made significant connections which justify our assumptions about the need for our proposed offerings. Our new Business Plan puts our values and our planning into action.

We would love to invite you to become a part of this exciting new social enterprising venture in whatever way you believe that you can support us successfully going forward.

Yours Sincerely,

Dr. David Mead and Gavin Morgan

Co-Chairs

Newbold House Centre for Partnership

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Scottish Charity Number SC017347

Executive Summary

The Newbold House is a Scottish-based charity and social enterprise, providing empowering and place based in-house programmes and a nourishing venue for individuals, groups and organisations wishing to accelerate the development of Partnership-based leadership both locally and worldwide. Housed in our beautiful late-Victorian mansion since 1982, with a glass conservatory and seven acres of grounds, we support organisations, corporations and communities to create healthy group cultures rooted in connection, creativity, and collaboration. (*Our Short Story, Organisational Overview: Introduction*)

In 2020, we are excited to be launching our new in-house programmes under the banner of ‘Culture Garden’, with flagship empowerment programmes including Youth Leadership for Collaboration, Communities’ Leadership for Empowerment, and Social Enterprise for Leadership for Collaboration, as well as local community-based wellbeing programmes and events such as Arts for Youth Wellbeing and Newbold Harvest Festival. (*What We Do, p5*)

Growing Partnership-based leadership and culture requires highly skilled and experienced facilitation, and our new management team are experts in their fields, having worked internationally with communities, corporations, charities and government programmes to support whole system change, moving away from top-down leadership to ecosystems where each member shifts the way they behave and relate to each other, for the benefit of the whole. (*How We Do, It p6*)

By pairing these new, empowering and place-based leadership programmes with the spectacular venue of Newbold House, with its rich heritage and history, we have a dynamic formula for attracting clientele both near and far. (*Our Venue and Our History, Organisational Overview: 2c & d*)

These new developments in our internal management and in-house programming plan all come as part of The Newbold House’s new Strategic Plan for 2020-23. (*p7-8*)

Having reflected on the learnings from our 2015-18 plan, we are continuing to nurture our loyal and regular client base, whilst streamlining our vision and mission, developing a more coherent strategy for our in-house programmes and seeking a more efficient business model for greater financial sustainability. Our three key objectives for 2023 are:

1. Achieving a £45,000 surplus by 2023, based on increased revenue from venue hire and the new in-house programmes;
2. Incorporating, from 2019 onwards, the ‘Culture Garden’ approach as its in-house offerings, thus providing a new, coherent vision and mission on which to frame activities designed to support clients cultivating healthy group cultures;
3. Designing and launching the implementation of a Heritage Management Plan to ensure the long-term sustainability and attraction of Newbold House’s venue, Newbold House.

Much work has gone into verifying the market viability for our Culture Garden Programmes, and we are convinced that we fill a vital gap in services provided to youth, communities, and organisations seeking more dynamic and connective systems. (*Market Analysis p9-10*). We have developed an ambitious **Operational Plan (p13)**, for upgrading our facilities, recruiting appropriately-trained staff, and developing mutually-beneficial relationships with local, national and international organisations, and with our experienced and skilled trustee and management team (*How We Are Organised, Organisational Overview: 4a-d*) now fully established, we are primed for success.

Ultimately, the Newbold House’s present aim is to successfully transition to a more sustainable and effective way of working as a social enterprise, maximising the potential for our cutting-edge programmes to proliferate community empowerment and Partnership-based leadership and culture in Moray, Scotland, and across the world.

Our Social Enterprise

What We Do

Newbold House provides:

1. Venue Hire

We provide a nurturing, supportive venue for residential trainings and retreats. We host local and international teachers and facilitators whose work relates to our ethos of connection-based leadership and culture, inviting them to practice their work in our well-supported environment and connecting them with a community of interested participants from Scotland and beyond.

For example:

Workshops in Effective Communication for Conflict Resilience

We host workshops that promote connective cultural skills, such as effective communication for conflict resilience.

Organisational Retreats

For organisations who practice and/or teach collaborative frameworks, such as Who Cares? Scotland, Gaia Education, or Transition Network.

Ceremonial Events

We host ceremonial events for weddings, funerals, rites of passage, and other life transitions. These events support our customers to connect with their own life's journey through periods of significant change, and are designed and supported by local ceremonialists and facilitators.

2. In-House Programmes and Events

We coordinate a community of experienced facilitators who produce our *Culture Garden Programmes*, as well as our *wellbeing programs* and *community engagement events*.

Culture Garden Programmes:

All of our Culture Garden programmes are comprised of a series of in-person modules, with online discussion, support, and project-based, community-engaged work in-between. Tailor-made for Youth, Communities, and Social Enterprise, they provide an orientation to the key elements of Partnership-based leadership and group cultures, experientially unpack best practices, and support participants to develop their own unique, place-based leadership ethos, which allows them to invest their learning back into their home cultures and communities.

For example:

Youth Leadership for Collaboration

The Newbold House's Youth Leadership for Collaboration program (*launching Spring 2020*) provides essential tools and practices, as well as opportunities for individual and group self-reflection, which empower young people to succeed in any collaborative group context. The program engages with leadership, not as a quality held by one person or by a select few, but as a whole-group phenomenon. The governance practices a group uses; the ways that conflict, feedback, and communication are navigated; a group's relationship to creativity and self-expression; its economic paradigms, and more inform what kind of leadership it potentiates and responds to. In the YLC program, youth are given experiential opportunities to build confidence using "cultural tools" that enable true collaboration in their school, employment, and community contexts.

- *This programme can also be run as Duke of Edinburgh or Erasmus*

Wellbeing Programs:

Our Wellbeing programs bring the ‘Culture Garden’ to some of the most vulnerable members of our local community, including Elders, Youth, and Veterans. Local facilitators provide well-supported experiences and activities which support participants to connect with themselves and each other in a wellness-enhancing way.

For example:

Arts for Youth Wellbeing

This weekly program uses artistic methods including painting, sculpture, and puppetry to support young people to connect with and express their inner life experience in a playful, safe and enriching format. Participation is by referral.

Newbold Gardening Program

These regular, supported drop-in sessions bring together diverse members of our local community to plant, sow, and harvest in our extensive Victorian kitchen gardens. These sessions provide the benefits of enlivening physical activity out-of-doors, as well as shared achievement and reflection, for all ages and abilities.

Community Engagement Events:

These place-based celebratory engagement events, held approximately each quarter, are opportunities to practice Partnership at the local level. They bring together the different elements of our Moray communities to share food, music, dancing, crafts, and stories, and to mark and celebrate the passing of the seasons. At each event, we aim to provide inclusive activities and leadership opportunities for the most vulnerable members of our communities; supported and participatory processes to facilitate discussion about important local and global issues; and, a showcase for local arts and culture.

For example:

Newbold House Harvest Festival

The Harvest Festival is an annual celebration of the Harvest season, celebrating local food as well as local music, crafts and charities from across Moray and the North East. Since 2014, it has provided an annual opportunity to bring families, food providers and entertainers together to celebrate the season. In 2016, the Festival hosted over 25 stall holders, musicians, talks, demonstrations, activity providers and food suppliers. Moving forward, this annual event will expand its focus to include inclusive activities and leadership opportunities for Youth, Elders, and Veterans.

How We Do It

We’ve learned a thing or two over the years. Most importantly, we’ve learned that Partnership-based leadership and cultures must be designed, planted, and tended to like a garden: with dedication, care, and skill. We’ve learned some of the most useful practices for cultivating these particular gardens, which we use in our own in-house team and facilitation community, and engage with in our programs. And guests, staff, and facilitators alike all routinely get their hands in the dirt in our *actual* garden, too – which is our greatest inspiration and teacher.

We believe that healthy leadership and group cultures help us *connect*: to ourselves, each other, and the world around us. The most vibrant and effective groups are those which – like a natural ecosystem – cultivate synergistic connections between their different parts, harnessing the intelligence of the whole for the greatest good.

Although it might sound counterintuitive, boundaries, conflict, and difference are essential features in an interconnected landscape. When handled well, they enhance a group’s ingenuity, bringing critical information to light which would otherwise have gone unnoticed, and enable it to make the best possible choices, to be responsive, and to learn. They also allow individuals to participate authentically, and to experience belonging amidst a diversity of perspectives.

Growing this kind of leadership and culture takes work. It can't be applied from the "top down;" it requires a whole system change, which involves every member shifting the way they behave and relate to each other. And, there is no "one size fits all" solution; every group has its own particular strengths, weaknesses and context, which will determine which leadership and cultural elements are most supportive, and make it most effective in the world.

Our Areas of Focus

- Shared Governance
- Social Justice
- Parts of Self and System
- Conflict, Boundaries and Difference
- Body-Informed Leadership
- The Masculine and The Feminine
- Beautiful Economics
- Practice of Change
- Community Engagement
- Nature Connection
- Wholesome, Local Food Production
- Storytelling, Performance & Play

Heritage Management

Our late-Victorian building and grounds are rich in historical and cultural significance. The 7-acre Newbold House Estate consists of four areas which can be considered discrete elements but all associated to make the whole place: the large house, formal gardens, walled kitchen garden, and the surrounding woodlands.

We are committed to maintaining each of these elements to a high standard, and to maximising our customers' engagement with and benefit from all they have to offer. In order to preserve the history of this beautiful estate, and to carry out needed restoration work and improvements, Newbold House plans to create a Heritage Management Plan. For more details, please see *Appendix I: Heritage and Asset Management*, p18.

Local Food

From obesity and diet-related ill-health to food poverty and waste, climate change and biodiversity loss to declining prosperity and social dislocation, food is not only at the heart of some of our greatest problems but is also a vital part of the solution. Much of the food we serve our customers is grown onsite, in our very own kitchen garden. We believe that growing, preparing, and presenting wholesome, locally-sourced food is a key contributor to the nourishing environment we provide to our customers, and to the benefits we bring to our local Moray communities.

Newbold House is prepared to become the Flagship for sustainable local food in Moray by:

1. Developing a cross-sector partnership of local public agencies, businesses, academics and NGOs committed to working together to make healthy and sustainable food a defining characteristic of Moray, and rural Scotland;
2. Implementing food systems in line with the Scottish governments Good Food Nations Bill (Local, Healthy, Sustainable) for the local communities and its clientele.
3. Establishing Newbold House as the central hub in Moray for the local food movement.

Strategic Plan 2020-23

Review of 2015-18 Strategic Plan

Through the 2015-18 period, the Newbold House continued to enjoy a loyal and regular customer base and hosted a range of workshops and events. However, the management team could not agree on a coherent strategy and business plan, with a clear vision and mission with which to maximise opportunities for venue hire and for running in-house programmes for the benefit of both the local community and national and international clients. This has resulted in the Newbold House becoming less financially sustainable, and fatigue within the residential community-based model on which the Newbold House has run up until now.

Main Objectives for 2020-23

The Newbold House embarks on its 2020-23 strategic plan with the priorities of improving its financial sustainability by maximising the potential of its venue and programmes for serving local communities and national and international clients in a coherent and efficient way, by:

1. Achieving a £45,000 surplus by 2023, thanks to increased revenue from venue hire and in-house programmes;
2. Incorporating, from 2019 onwards, the ‘Culture Garden’ approach as its in-house approach, thus providing a new, coherent vision and mission on which to frame activities designed to support clients cultivating healthy group cultures;
3. Designing and launching the implementation of a Heritage Management Plan to ensure the long-term sustainability and attraction of Newbold House’s venue, Newbold House.

How We Will Achieve Our Objectives

1) Achieving £45,000 surplus by 2023

- Increased Revenue from Venue Hire:

Revenue from Venue Hire will have increased from **£147,334 to £224,245** by 2023, with 149 days of annual hire coming from use under the following aligned themes:

- i. Workshops
- ii. Organisational Retreats
- iii. Ceremonial Events

Cf. Operational Plan Summary for more details.

- Increased Revenue from In-House programmes:

Revenue from Culture Garden Programmes to reach **£225,000** by 2023, based on running up to 3 year-long programmes per year. Programmes to include:

- i. Youth Leadership for Collaboration
- ii. Community Leadership for Collaboration
- iii. Leadership for Social Enterprise

Cf. Financial spreadsheets for details on costings and rates for each programme.

2) Incorporation of ‘Culture Garden’ approach

Cf. previous ‘About Us’ section, for a summary of the newly designed ‘Newbold House - The Culture Garden’ approach, with its vision, mission, programme design and methodology, which will now be rolled out.

3) Heritage Management Plan

In order to preserve the history of this beautiful estate and to maintain it as a major asset in the attraction of clients, Newbold House will create a Heritage Management Plan in 2020, and implement it in 2021-22. This plan will:

- Present the History of the house and estate
- Identify the Cultural Significance of the Place
- Identify Opportunities and Constraints for future use of the Place
- Create Policies for the Management of the Cultural Significance of the Place
- Present a timeline and projected costs for needed upgrades, restoration, and repairs

Cf. Annex I for details on the history of Newbold House and its land, and on the Heritage Management Plan.

Market Analysis – Venue & Programmes

In order to ensure that our strategic plan is viable, we have assessed our markets for both Venue Hire and In-House Culture Garden Programmes. We have identified our current strengths to-date, and how we can build on our potential by increasingly filling the gaps, locally, nationally and internationally, in meeting market demand for a venue hosting and supporting individuals, organisations and communities seeking to build collaborative group cultures.

Venue Hire

Market Research

Over our 35+ years of operating as a retreat community, we have cultivated a loyal customer base of independent facilitators. We have learned from experience what their needs and priorities are, and ongoingly evolve our Venue services to best meet their needs. These facilitators include:

Northern Lights Sangha	Yearly Buddhist meditation workshop, usually in February	40 people
Kurikindi	Amazonian shaman organising workshops and private healing sessions	10 people
Love Yoga	Regular yoga retreats, twice a year	20 people
Gene Keys	Regular workshops regarding Gene Keys system	50 people
Jac O'Keefe	A non-dualistic teacher, having a workshop once per year, usually in May	30 people
ISTA	Sexuality workshops, usually once per year	45 people
Teresa Syed	Feminine workshops	10 people
SEDA	A yearly conference, Scottish Ecological Design Association	15 people
EDEN Energy	Teachers training in Eden Energy, 4 workshops per year	10 people
Weleda	Cosmetic company, new customer, organising one day meeting	10 people
Miracle Choice	A spiritual game facilitator, local workshop leader	10 people
Charioteer Theatre	A regular customer, bringing Italian teenagers for creative drama workshops	15 people
Tango	Organising tango workshops	15 people
Living with soul	Spiritual teacher organising workshops worldwide	20 people
Coyote Initiatives	A regular customer, organising ERASMUS+ training for young people	30 people
Listen Well	An organisation specialising in developing listening skills based in Nairn	15 people
Moray Collage	Regular customer, organising residential weekends for students	20 people

Market Identified

We will continue to engage these and other longstanding customers; however, we will also market our venue to facilitators and groups whose work relates to connection-based leadership and culture. Such customers include:

Animas Valley Institute	Nature-based soul initiation for personal leadership & cultural regeneration	20
8 Shields Institute	Rebuilding nature-connected intergenerational mentoring communities	25
Good Governance Institute	Supporting good governance practices in the UK	10
Ashridge Business School	An agile business school for global leadership	10
Roy Hart Theatre	Voice-based interconnective practices for groups	15
Open Edge	Transforming conflict, facilitation and training	15
Body-Informed Leadership	Body-based practices for connective, creative, and collaborative group cultures	25
RISE Beyond	Consulting for collaborative organisations	20

In-House ‘Culture Garden’ Programmes and Events

We have done extensive market research for our ‘Culture Garden’ Programmes and Events over the last three years. Through this process, we have defined our 3 Programming areas:

1) Flagship Empowerment Programs in Partnership-Based Leadership and Culture

Market Research

Over the past decade, Scotland has invested significant time, energy, and financial resources to empower communities to collaborate in service of local wellbeing, to participate in local governance, to manage their own assets, and to build economies that serve local needs by developing the Social Enterprise sector. The Scottish Community Empowerment Act is one example of how these priorities have been put into play at the policy level; organisations such as Corra Foundation and programs such as “Getting Alongside Communities” aim to enable them on the ground, in communities.

However, despite these efforts, our market research indicates that one crucial element has been overlooked. Many communities lack the education, training, and supported practice in the personal and interpersonal skills which ultimately allow effective, collaborative engagement to happen. They therefore face an invisible barrier to participating in local engagement, governance and social enterprise. Furthermore, the ongoing provision of external facilitation for community processes without attending to this skillset can perpetuate communities’ dependence on external authorities and facilitators for their effectiveness and long-term success.

These findings are based on an initial assessment of services available to Moray County residents, of services provided by 3 National community empowerment and engagement organisations (Corra Foundation, Scottish Community Development Centre, and Development Trusts Association Scotland), as well as informal interviews with representatives from local (Moray) and National bodies, including:

- Moray Council
- Scottish Community Development Network (SCDN)
- tsiMORAY
- School for Social Entrepreneurs Scotland (SSES)
- Community Learning Exchange
- Highlands and Islands Enterprise (HIE)
- Impact Hub Inverness
- Community Enterprise Scotland
- Moray College UHI
- Glasgow School of Art Design

Newbold House is preparing for further interviews and partnership-building with the following local (Moray) and National groups:

- Moray Council Community
 - Committee
 - Support & Justice Partnership
 - Engagement
- Moray Youth Justice Team
- Employability Moray
- Moray Economic Partnership
- Sustainability & Communities Partnership
- Moray Skills Investment Group
- IGNITE: Moray Youth Arts Hub
- Developing the Young Workforce
- Fair Start Scotland
- Employability in Scotland Partnership
- Interface
- Social Enterprise Networks
- Cooperative Development Scotland

Market Identified

To address the identified need for collaborative leadership skills, The Newbold House is developing education and training programs in collaborative leadership and culture for:

- Communities
- Social Enterprises
- Youth

These programs will equip participants with the tools and practices to work effectively together towards common goals and to bring sensitivity, awareness and skill to key areas such as decision-making, conflict, and diversity. We will be marketing these programs locally and nationally, and are developing partnerships with the groups listed above to ensure our programs most effectively meet the needs of the communities they are designed to serve.

2) Wellbeing

Market Research

NT has many longstanding wellbeing-oriented partnerships at the local and national levels, as well as years of experience offering programming for wellbeing. We are preparing for further interviews and partnership-building with the following local (Moray) groups:

- NHS Grampian
- Moray Wellbeing Hub
- Moray Alcohol & Drug Partnership
- Moray Youth Justice Team
- Health & Social Care Partnership
- IGNITE: Moray Youth Arts Hub
- Health and Social Care Moray
- Aberlour Youthpoint Moray
- Moray Council Community Wellbeing

Market Identified

Our Wellbeing programs bring the ‘Culture Garden’ to some of the most vulnerable and isolated members of our local community, including:

- Veterans
- Elders
- Youth

3) Community Engagement

Market Research

The market research described above underscores the importance of supporting people to participate and engage collaboratively in their local communities and economies. To truly address this need, we go beyond simply teaching the skills and practices for collaboration: we provide regular Community Engagement events which support our local communities to put these skills and practices into action in all aspects of community life: in arts and culture as well as in local decision-making, governance, economics, and justice.

Market Identified

These events will involve all members of our local Moray communities, with a particular emphasis on including and supporting:

- Veterans
- Elders
- Youth

Participants will be supported to listen and learn from each other, to share leadership, and to connect and create together in an atmosphere of celebration, while tackling real-world issues at the same time. Our Community Engagement Programmes will draw from the expertise developed in our Collaborative Leadership Programmes – and vice-versa – to ensure that the skills the Newbold House teaches are put into practice at the local level, in service of community-wide empowerment and engagement.

SWOT Analysis

In order to ensure that we maximise our opportunities for meeting market demands when developing our operational plan, we have conducted the following SWOT analysis:

<p style="text-align: center;">Strengths</p> <ul style="list-style-type: none"> • Well-established international clientele and glowing reputation as a venue for residential retreats; • Mortgage-free ownership of our venue and grounds of 7 acres. Estimated Asset value of circa. £850K; • Well-established gardens, grounds, kitchen, and indoor venue spaces that are fully operational and ready for business; • Asset Management and Maintenance Plans in development, with on-site certified electrician & plumber. • Clearly defined Vision, Mission, Aims; • Clearly differentiated programming ethos and target market, which distinguish us from other local and National programme providers. We have clearly identified our “niche;” • A skilled and experienced Board of Trustees, with local engagement and representation. 	<p style="text-align: center;">Weaknesses</p> <ul style="list-style-type: none"> • Group size is limited by the number of beds we have available (24); • Accommodation is shared, and rooms have shared (rather than ensuite) bathrooms, which limits the amount we can charge for retreats; • Our venue is located just far enough outside of Forres that it can limit access for those without a car. • Newbold has struggled financially over the decades as a community, while aiming to ensure a profitable enterprising venue.
<p style="text-align: center;">Opportunities</p> <ul style="list-style-type: none"> • Because of the Findhorn Foundation, Forres is already “on the map” as a destination for high-calibre international facilitators in “cultural” modalities. This naturally provides an opportunity for us to provide a venue for facilitators who want to reach the Findhorn market, yet who seek a more intimate, all-inclusive environment for their programs; • We are well-positioned to meet the identified need for accessible, high-quality, immersive programs in collaborative leadership skills for Scottish and international Youth, as an important enabler for Social Enterprise, employment, and community participation; • Our current leadership team has the necessary skills and experience to create a highly-functioning organisational team with a healthy internal culture; • We are developing relationships with local partners such as TSI, Moray Council, FACT, and HIE. 	<p style="text-align: center;">Threats</p> <ul style="list-style-type: none"> • Failure to obtain sufficient development capital will impede our ability to recruit a skilled staff team, and to complete the necessary property upgrades to complete this crucial developmental phase; • Our Victorian building requires ongoing maintenance, and lacks energy efficiency; • Newbold has a reputation locally as being an exclusive and perhaps eccentric organisation, which could impede our ability to forge lasting local partnerships; • The negotiation of synergistic relationships with existing local and National organisations and communities can take time to establish; • Brexit could negatively impact the international element of our programming.

Operational Plan to Achieve 2020-23 Objectives

2019 – 2020

- Commence expansion of staff team
- Design in-house programming
- Initiate long-term partnerships with Councils, Social Enterprise and Education bodies in Morayshire and the north of Scotland for local take-up of in-house programmes;
- Create Heritage Management Plan & Building Survey – apply for Historic Environment Repair Grant

2020 – 2021

- Continue the expansion of staff team
 - Marketing and Communication a focus
- Develop and implement Communications strategy to promote in-house programming, and to attract guest bookings that align with Newbold’s ethos
- Develop network of affiliated facilitators to hire venue for programmes.
- Initiate property upgrades
 - Building forest shelters and “light” accommodation, Upgrading staff accommodation and kitchen facilities, Re-paving the driveway, installing new signage, and purchasing grounds-keeping equipment, upgrade attic for guest use.
- Initiate in-house programming:
 - Youth Leadership Pilot Program
 - Youth Leadership Intensive
 - Communities Intensive
- Attract and host guest groups in alignment to Newbold’s Vision, Mission & Aims
- Further Develop Managerial Staff team
- Create Maintenance and Asset Management Plan
- Initiate Restoration of Conservatory
- Commence building of outdoor light accommodation and classrooms
- Install Fire Escape to enable use of Attic rooms for workshops

2021 – 2022

- Continue in-house programming:
 - Communities Intensive Program
 - Intensive Program for Social Enterprise
 - Youth Leadership Intensive Program
- Attract and host guest groups in alignment to Newbold House’s Vision, Mission & Aims
- Continue property upgrades as needed

2022 – 2023

- Continue in-house programming as designed and funded
- Continue property upgrades as designed and funded
- Ensure outcome targets are being met
 - Complete all remaining targets and re-evaluate as needed
 - Adjust assumptions and cash flow to ensure business plan completion

Annex I: Heritage & Asset Management

Heritage Management Plan

The Newbold House Estate consists of four areas which can be considered discrete elements but all associated to make the whole place:

- **The large house** - an imposing late Victorian family residence with a set of grand ground floor rooms, family bedrooms above on the first floor, and an attached service wing with servants quarters above kitchen and ancillary rooms. Attached to the east side is a Victorian conservatory which is in need of repair.
- To the south are **formal gardens** and a grass bowling green.
- To the north is a **partly walled kitchen garden** with a timber-framed green house and two poly tunnels. Both within and without this garden is an apple orchard of many old varieties. The north wall of the kitchen garden once supported an extensive glass-house with a heating system of which only the brick chimney remains.
- Surrounding the house and gardens is a **woodland** of mature native and exotic trees with overgrown walks and the remains of other garden features.

In order to preserve the history of this beautiful estate, and to carry out needed restoration work and improvements, Newbold House plans to create a Heritage Management Plan. This plan will:

- Present the History of the house and estate
- Identify the Cultural Significance of the Place
- Identify Opportunities and Constraints for future use of the Place
- Create Policies for the Management of the Cultural Significance of the Place
- Present a timeline and projected costs for needed upgrades, restoration, and repairs

Elements of the Plan

The Heritage Management Plan will include the following key considerations:

- **Accommodation**
These require some upgrading to furnishings, decoration and upholstery to restore a sense of grandeur. There are opportunities for community involvement in decoration, etc.
- **Gardens**
 - *Formal Gardens:* With a good planting plan these can be used extensively in the summer months for events.
 - *Kitchen Garden & Orchard:* Could be restored to a proper Victorian-style kitchen garden with courses in food growing/permaculture & food preserving in the kitchen (creating opportunities for additional funding). Other potential opportunities include bringing in children from local schools to learn about food-growing; a project to build a glasshouse along the north wall (additional funding required); installing a biomass boiler in the centre of that wall using the original chimney as the flue to heat this glass-house and the whole building (additional funding required).
 - *Removing old caravans and yurts:* can be replaced with proper eco-huts with a community build/natural building school project.
- **Attic**
This is a very useful space, but cannot be used without a fire escape stair. Putting the Attic space into regular use will increase our workshop capacity by 50%. Any plan for the property will include plans to install such a stair at the back of the main house in the service courtyard, linking each level.

- **Conservatory**
If restored, the Conservatory will be a considerable asset in itself, as a site of historical interest and beauty. Additionally, it will become a venue for meetings, quiet space, sun-room in winter, and more when linked to the formal gardens (for receptions, weddings, teas, etc).
- **Woodlands**
A plan will consider the benefits of a community project to thin them out, create woodland walks, take out some old trees, plant new and possibly connect this with Meury Woods (a project with the Forres Community Woodlands Trust which also owns Sanquhar Woods).

Resources

- Creation of a **Heritage Management Plan** has been proposed, to be funded through project funding (2020).
- A **Building Survey** (required to support the Plan) has been proposed, also to be obtained through project funding (2020).
- Creation of a **Maintenance Plan** will be carried-out by our in-house team, based upon the findings of the Survey and HMP (2020/2021).
- Application for **£150,000** in funding to restore the **Conservatory** is anticipated in April 2020, following up on a team of expertise that researched and supported a funding bid in 2017.

Funding Sources:

- *Heritage Lottery Fund*
- *Historic Environment Scotland*

Annex II: Budget Narrative & Financial Spreadsheets

BUDGET NARRATIVE

Management and Reporting

Newbold House's 2020-23 Company Budget is based on over 35 years' experience running the organisation and its associated areas of output, alongside information gathered during the research and planning to create a new business plan. The Managing Director and the Accounts Manager take responsibility for all aspects of day-to-day financial management. This includes the creation of financial strategies, which are reported monthly to the Board of Trustees. This ensures the Business plan and organisational visions can be achieved, while creating and updating company-wide and project budgets, day-to-day bookkeeping and the paying of suppliers, alongside the negotiation of contracts with clients and partners. The Accounts Manager produces management accounts and prepares the annual accounts for independent examination.

Reserves Policy

It is our intention to build a 3-month reserve. This has proved difficult over the years, as the business plan always revolved around a live-in community of 15 residents. Newbold has reduced its live-in residents, and has more space to host the increase of clientele our new business plan will invite. Business development funding will allow us to develop the organisation for us to now be considering a reserves policy as a serious prospect. We will propose to ensure that any accumulation of surpluses (less any losses) be diverted into the creation of a reserve.

Budget Flexibility

The budget reflects our intended activity from November 2019 to March 2023. To the best of our knowledge, this budget is reasonable, accurate and achievable, as of December 2019. Newbold House is a responsive, experienced and flexible organisation and our systems and staff can accommodate change.

Status of Proposed Funding

All additional funding in the income lines of the attached budget are reasonable projections and as yet provisional or unconfirmed.

Earned Income:

The present Board have recognised the need to become more enterprising, while networking and connecting more widely with our communities, to better serve the needs of our local and international communities. To that end we have made excellent inroads into developing partnerships. We have also reduced our live-in staff and are recruiting appropriately trained staff to take us to the next level. We are developing our own in-house leadership programmes and venue space for individuals, groups and organisations wishing to accelerate the development of connection-based leadership and cultures worldwide.

Trusts and Grant Giving Bodies:

While Newbold does not have an extensive track record with regards to this source of funding, we fully expect to achieve the targets set out in the budget. We have an experienced fundraiser as our Project Development and Resourcing Manager and excellent and eminently fundable activity streams.

FINANCIAL SPREADSHEETS (Attached)