



## **Business Plan 2008 to 2010**

Update 08/08

Company number: 5177284  
Charity number 1108280

## History:

South Lakes Development Trust (SLDT) was incorporated as a private company limited by guarantee in July 2004 and awarded charitable status in February 2005.

SLDT was established as a result of the foresight of the originating **Lakes Market Towns Partnership (LMTP)**, a partnership established under the **Market Towns Initiative (MTI)** developed and promoted by **The Countryside Agency** and subsequently funded through the **Northwest Regional Development Agency (NWDA)**.

LMTP brought together key organisations, authorities and agencies seeking to identify and find opportunity to deliver positive change to meet the future needs of the communities served by the Parishes of **Lakes** and **Windermere**.

A highly proactive partnership LMTP quickly identified the innovative opportunity presented by the establishment of a social enterprise capable of responding positively to community need, and through which onward funding secured could be managed.

The ability to pool staff resource and expertise within one organisation, through which a number of varied projects could be managed and delivered, was identified as a highly efficient model, one capable of releasing more significant levels of funding to project delivery rather than administration.

Furthermore it was recognised that a number of the projects proposed under the Initiative were capable, over time, of creating revenue streams that could be maintained beyond the term of the initial project funding. Such opportunity offered the high probability that once established a social enterprise model offered a significant route to the development of a sustainable organisation, one capable of maintaining delivery of key projects beyond the term of the originating funding and thereby delivering a sustainable and effective legacy for MTI in this area.

The establishment of SLDT and its procurement of £1million NWDA funding to manage and deliver a wide range of projects identified through community consultation as being desirable to help maintain the future integrity of the community offered the first step towards the development of an organisational vehicle capable of moving toward financial sustainability beyond March 2008, the term of originating NWDA funding.

Since commencing management and delivery of the projects funded through the MTI South Lakes Development Trust has successfully attracted additional levels of match and additional project funding adding substantial value to the effectiveness of the organisation and enhancing its capability to deliver benefit into the wider community served.

South Lakes Development Trust is governed by an independent board of directors/trustees drawn from various sectors of the resident and business community. A representative of South Lakeland District Council is invited to attend Board Meetings in an advisory capacity only but neither SLDC, nor any other public authority, holds voting rights within the company.

### **Key projects delivered to March 2008:**

- Performing Arts Structure – The Glebe, Bowness
  - Improvements to public realm - Ambleside Market Cross and Ambleside King Street
  - Feasibility Study into WEEE recycling and training centre, Ambleside.
  - Feasibility/Development Study – informing future development opportunity re: Troutbeck Bridge Swimming Pool.
  - Feasibility Study – Cultural Hub within MTI area.
  - Ambleside & Waterhead Master planning exercise.
  - Waterhead Feasibility Study.
  - Ellerthwaite Square Windermere – master planning.
  - Brockhole Development study – study procured by Lake District National Park Authority though SLDT.
  - Crescent Road Master Plan – final proposal development for public realm enhancements to Crescent Road.
  - Windermere Youth Project- funding toward provision and development of local youth services.
  - Parking Needs Survey - to establish the actual parking need for the Bowness and Windermere area
  - Community Chest - a capital grants fund to support local community projects.
  - Shop Front Enhancement Scheme – capital grants towards enhancement delivery.
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- Towns Centre Management – supporting Windermere, Bowness, Ambleside and Grasmere.
  - Lakes Line Community Rail Project Management - facilitation of the post.

### **Revenue generating projects:**

- Lakes Futures Business Resource Centre: delivering practical business resource support at many levels to provide key assistance to new and emerging small business enterprise.
- Lakes Futures Business Forum – a business networking opportunity to help re-engage business to business communication.
- Click Lakes – IT and web development support for new and emerging enterprise.
- Business Support & Training – delivering bespoke retail consultancy and training to the retail and small business sector.

- **Organisations with whom SLDT has an established advisory (a) and/or ongoing trading relationship (t):**

- South Lakeland District Council (a/t)
- Cumbria County Council (a/t)
- Cheshire County Council (a/t)
- Cheshire Community Action (a/t)
- Carlisle City Council (t)
- Main Marketing Limited (a/t)
- Blackburn & Darwen Borough Council ( via Main Marketing Ltd ) (t)
- Penrith, Garstang, Neston and Ashbourne MTI partnerships, (a/t)
- Post Office Ltd (a/t)
- Resolve Mediation Services ( Cumbria) (t)
- South Lakes Tourism Action Group (t)
- Range of independent local businesses receiving regular administrative support (t)
- Local Strategic Partnership (a)
- Lake District National Park Authority(a)
- Cumbria Tourism. (a)
- World Heritage Inscription Steering Group(a)
- University of Cumbria (a)
- Neighbourhood Forum(a)
- Windermere & Bowness Masterplan Steering Group(a)
- Ambleside & Waterhead Masterplan Steering Group(a)
- Windermere Town Council. (a)
- Lakes Parish Council (a)
- Local Chambers of Trade and trade associations. (a)
- Voluntary Action Cumbria(a)
- Business Link(a)

**Organisations with whom SLDT is presently negotiating to provide new/additional services:**

- Carlisle City Council (Pedestrian Surveys/Retail training)
- Whitehaven Business and Education Centre ( Lakes College West Cumbria – retail training)
- South Lakeland District Council (Retail Training/Customer Service Training)

Commencing April 2008 SLDT was challenged by the objective to maintain its support capacity to the wider community whilst continuing to develop trading activities that, over time, would be capable of generating sufficient revenue income to enable financial self sustainability. Operational surpluses so created being delivered back into meeting the charitable objectives of the company.

In positioning itself to dynamically move towards financial sustainability it was recognised that, in the first full financial year following termination of the MTI funding programme, there would be need to secure the identified financial deficit between projected revenue income and the core cost required to maintain project delivery capability. There was recognition that release from the substantial administrative bureaucracy required from projects calling on public funding would enable a more commercially orientated focus on business development. Such development was identified as being the key to achieving the financial independence and onward sustainability desired but recognised as not being immediately attainable due to the service delivery nature of some elements of the onward business focus.

Initial forward projections for the year 2008/2009 identified a core cost requirement of approximately £200k with proposed trading revenue delivering approximately 50% of that requirement. It was therefore necessary to secure a funding commitment in advance of the commencement of the financial year to ensure financial solvency could be assured.

After extensive negotiations funding was attracted from a number of key local organisations who recognised the value that had already been delivered through SLDT and who identified the onward opportunity that could be derived within our community through a social enterprise conduit capable of responding and delivering to local need manner that would not be attainable through local authority process or the private sector.

It was therefore in advance of the commencement of the 2007/09 financial year that key funding was identified from:

South Lakeland District Council	£40,000
NWDA	£30,000
Cumbria County Council	£ 5,000
Windermere Town Council	£ 2,500
Lakes Parish Council	£ 2,500
Lakeland Limited	£20,000 (with a commitment to £10k year 2)
Booths Limited	£ 3,000

Such funding was additional to a final year of support funding from the Lankelly Foundation to a value of £5,000.

Thus, of the identified core cost requirement of £200,000, some £80,000 (40%) was identified as public sector, £5,000 (2.5%) charitable foundation with the balance ( including trading revenue ) being private sector derived (57.5%)

It was therefore with confidence that the board of SLDT were able to take the company forward into the financial year commencing April 2008 in the knowledge that the funding secured enabled the capacity for the company to further develop its project delivery whilst building its trading capacity towards sustainability.

During the months leading to the procurement of the funding secured the onward intentions of SLDT were promoted through a document entitled “**Enabling, Providing and Securing**” which summarised the capacity developed within SLDT since its establishment and the major outputs that could be achieved by the onward sustainability of the organisation. “**Enabling, Providing and Securing**” is appended hereto (**appendix iv**)

### **Structure for sustainability**

In order to maximise the ability to progress towards onward sustainability it has been necessary to focus future project delivery capability to key areas where developed expertise can most effectively be utilised to achieve the required objectives.

To this end it has been possible to realign staffing levels to enable delivery focus to be concentrated on outputs delivering tangible benefit to resident, business and visitor wellbeing and whilst assisting towards the delivery of a vibrant local economy.

### **Key focus for onward delivery:**

- Towns Centre Management Services.
- Business Resource and IT Support to small independent businesses and third sector organisations.
- Retail and Rural Services Business Development Consultancy and Training.
- Public Realm Enhancement and Regeneration.

## Delivery overview

### **Towns Centre Management**

- To help establish and maintain an economically active and well maintained physical environment within the key trading areas of Ambleside, Bowness, Grasmere and Windermere.
- Development/Identification of projects capable of delivering improved trading vitality.
- Assistance towards facilitation of means to deliver such opportunities.
- Development/Identification of projects capable of delivering improved services to the resident community
- Assistance towards facilitation of means to deliver such opportunities.
- Assisting to promote awareness of projects delivering benefit, or impacting negatively, upon the business and resident community.
- Liaising with other organisations and authorities to maximise delivery of beneficial projects into the area.
- To act as an independent broker to help resolve issues affecting the vitality of our trading environment.
- To signpost those requiring assistance to established service and support provision as might be appropriate or seek route to address the issues locally.
- To advise and assist as appropriate in the development of local events and activities identified as delivering longer term benefit to the area.

### **Business Resource and IT Support**

- To deliver tangible business resource support to small independent businesses where such support can directly assist towards onward business development and employment creation.
  - Bespoke telephone answering
  - Administrative and secretarial support 'on demand'
  - Book keeping and salary management.
- To assist in the development of technically proficient website technologies and deliver associated IT support.
- To manage the onward development of the Lakes Futures Business Network to provide a 21<sup>st</sup> century solution to local business networking and provide a conduit for expression of business concerns and identification of potential solutions.

### **Retail and Rural Services Business Development Consultancy and Training.**

- To deliver bespoke retail development consultancy and training across the region to help maintain and develop financial viability and onward sustainability within:
  - Rural shops and Post Offices
  - Farm shops
  - Independent high street traders
- To deliver bespoke consultancy services and training to help identify opportunities to assist in the maintenance and onward development of other viable key service businesses within our rural communities.
  - Pubs
  - Service Stations
- To assist and facilitate opportunities to enhance business well being through improved networking and B2B activity.
- To advise and assist in the active development of Rural Retail Advisory Partnerships such as those established in Cheshire and Cumbria.
- To improve awareness of the challenges faced by the independent retail sector and seek to identify projects capable of improving.
- Delivery of 'Welcome Host for Retail' and bespoke Customer Care courses across Cumbria.
- Development and delivery of retail training directly, or in partnership with other like minded organisations, to assist in the development of the sector as a offering a credible career opportunity.

### **Public Realm Enhancement and Regeneration.**

- To actively participate in the identification and onward development of projects capable of delivering high quality public realm into the Lake District capable of meeting the future needs of the resident, business and visitor economy.
- To engage in processes that encourages designated authorities to address issues impacting negatively on the maintenance and delivery of high quality public realm.
- To seek to encourage and facilitate the delivery of high quality public services and facilities meeting resident, business and visitor needs such as public toilets, car park, street cleanliness and leisure facilities.
- To 'project manage' initiatives directed towards the delivery of high quality public realm enhancement and regeneration.
- To deliver Pedestrian Surveys to help inform those taking forward enhancement and regeneration projects as to how public space works, and how it might best be improved.

## **Notes relating to financial projections**

### **Revenue 2008/2009**

The grant income identified within the financial projection has been secured.

The trading revenue is based upon realistic income expectation based upon

- consultancy contracts already negotiated for delivery during the year.
- positive indicators regarding commissioning of work for which negotiations are in currently hand.
- realistic expectation for additional consultancy work based on developing credibility and active marketing of this bespoke service.
- ongoing revenue and potential income development from organisations utilising Business Resource Centre services.
- commercial projections for IT and web support commissions.
- Estimated project management fees based upon % of total project fees identified as likely to be delivered during the year.

### **Expenditure 2008/2009**

Salaries are based on the maintenance of the core staffing level required to deliver the services for which income stream identified:

- Chief Executive ( incorporating Retail & Rural Service Consultant and project management)
- Financial Administrator ( incorporating book keeping resource support)
- Towns Centre Manager ( also delivering aspects of project management and Pedestrian Surveys)
- IT Support Manager ( IT and website support delivery)
- Administration Assistant ( supporting SLDT staff and delivering resource support to client base)
- Lakes Line Community Rail Officer ( a facilitated post attracted a fee for delivery)

The balance of expenditure identified within the projection is based on established costs from operation over past years, adjusted to allow for any business development incorporated within the analysis.

In order to address the need of maintaining expenditure as a necessary control towards achieving the financial sustainability objective it has been recognised that an opportunity exists to reduce premises rental costs by relocation.

Negotiations are currently in hand with Cumbria County Council regarding the potential occupation of 1000sq.ft of office space within the premises of Windermere Library. The relocation would enable all prime revenue development opportunities to be maintained, but would result in the loss of workspace provision.

The provision of workspace has been the most erratic aspect of previous business resource support with occupancy levels fluctuating but rarely achieving breakeven against the master rental payable by ourselves. Without breakeven there is an ongoing cost against the Trust which is considered not to offer a realistic commercial venture.

It is intended that ongoing occupation of the present workspace units can be negotiated with the landlord for those wishing to remain within Windermere Business Centre.

It is projected that occupation of the library premises is likely to take place in December 2008 with a rent free period from CCC whilst set up costs are recovered. Allowance for this change is contained within the projection, as is the reduction in income derived from the workspace units and lower initial income from alterations to usage of training room facilities.

### **Revenue and Expenditure considerations 2009/2010**

The projections are based on realistic targets for service delivery with potential increase in staffing level to incorporate a Senior Business Support Assistant to help deliver the additional project management and support work identified in the projections.

Although based on growth towards sustainability the projections contain a materially reduced element of grant funding due to the recognised value of Towns Centre Management support to District, County and Parish Councils. £10k has already been secured from the private sector.

Subject to projected level of business development there would be no reliance on grant funding for the year **2010/2011**.

## Appendix I – financial projection 2008/2009

2008/09	April	May	June	July	August	September	October	November	December	January	February	March	Total
<b>Income</b>													
Grant Income													
Lakeland Limited	20000												20000
Booths		3000											3000
SLDC	20000						20000						40000
NWDA advanced by SLDC		7500			7500			7500			7500		30000
CCC									5000				5000
WTC						2500							2500
LPC						2500							2500
	40000	10500			7500	5000	20000	7500	5000		7500		103000
Sales Income													
Admin fees BRC	580	530	530	530	530	530	580	530	530	530	530	530	6460
Accounts	525	595	525	525	825	525	525	525	525	525	525	525	6670
Consultancy fees	2210	2210	2210	2210	2210	2210	2210	2210	2210	2210	2210	2210	26520
Workspace units	802	802	802	802	802	802	802	802	802				7218
Meeting room hire	758	758	758	758	758	758	758	758	758	100	100	100	7122
LLCRP funding	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050	12600
IT income	1600	1600	1600	1600	1600	1600	1600	1600	1600	1600	1600	1600	19200
Project management fees									15000			15000	30000
	7525	7545	7475	7475	7775	7475	7525	7475	22475	6015	6015	21015	115790
<b>Total Income</b>	47525	18045	7475	7475	15275	12475	27525	14975	27475	6015	13515	21015	218790

<b>Total Income</b>	47525	18045	7475	7475	15275	12475	27525	14975	27475	6015	13515	21015	218790
<b>Expenditure</b>													
Salaries	10139	10139	10139	10643	10643	10643	10643	10643	10643	10643	10643	10643	126204
Rent	2129	2171	2214	2257	2299	2342	2342	2342	2342				20438
Transfer premises cots										7026			7026
Telephone	30	373	30	30	373	30	30	373	30	30	373	30	1732
Ins/Leg/Prof Fees	50	790				5250		1200			35		7325
Print/Stationery	810	810	810	810	810	810	810	810	810	810	810	810	9720
Repairs	150	150	150	150	150	150	150	150	370	150	150	150	2020
Training	100	100	100	100	100	100	100	100	100	100	100	100	1200
Recruitment/facility		200	1000			1000	1500	200		1000			4900
Travel/Subsistence	250	250	250	250	250	250	250	250	250	250	250	250	3000
On costs	1008	1008	1008	1072	1072	1072	1072	1072	1072	1072	1072	1072	12672
Pension costs	460	460	460	480	480	480	480	480	480	480	480	480	5700
LLCRP Officer	833	833	834	833	833	834	833	833	834	833	833	834	10000
LLCRP on costs	49	49	49	49	49	49	49	49	49	49	49	49	588
<b>Total Expenditure</b>	16008	17333	17044	16674	17059	23010	18259	18502	16980	22443	14795	14418	212525
<b>Surplus/(Deficit)</b>	<b>31517</b>	<b>712</b>	<b>(9569)</b>	<b>(9199)</b>	<b>(1784)</b>	<b>(10535)</b>	<b>9266</b>	<b>(3527)</b>	<b>10495</b>	<b>(16428)</b>	<b>(1280)</b>	<b>6597</b>	<b>6265</b>

## Appendix ii - financial projection 2009/2010

2009/10

	April	May	June	July	August	September	October	November	December	January	February	March	Total
<b>Income</b>													
Grant Income													
Lakeland Limited	10000												10000
Booths	3000												3000
SLDC	7500						7500						15000
NWDA advanced by SLDC													
CCC				5000									5000
WTC						3000							3000
LPC						3000							3000
	20500			5000		6000	7500						39000
Sales Income													
Admin fees BRC	2048	2047	2048	2047	2048	2047	2048	2047	2048	2047	2048	2047	24570
Accounts	625	625	625	625	625	625	625	625	625	625	625	625	7500
Consultancy fees	5042	5042	5041	5042	5042	5041	5042	5042	5041	5042	5042	5041	60500
Hotdesk facilities	275	275	275	275	275	275	275	275	275	275	275	275	3300
Meeting room hire	312	313	312	313	312	313	312	313	312	313	312	313	3750
LLCRP funding	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050	12600
IT income	2500	2500	2500	2500	2500	2500	2500	2500	2500	2500	2500	2500	30000
Project management fees			5000			15000			15000			15000	50000
	11852	11852	16851	11852	11852	26851	11852	11852	26851	11852	11852	26851	192220
<b>Total Income</b>	32352	11852	16851	16852	11852	32851	19352	11852	26851	11852	11852	26851	231220

<b>Total Income</b>	32352	11852	16851	16852	11852	32851	19352	11852	26851	11852	11852	26851	231220
<b>Expenditure</b>													
Salaries	12459	12459	12459	12459	12459	12459	12459	12459	12459	12459	12459	12459	149508
Rent		1067	1067	1067	1067	1067	1067	1067	1067	1067	1067	1067	11737
Telephone	30	373	30	30	373	30	30	373	30	30	373	30	1732
Ins/Leg/Prof Fees	55	810				5300		1230			35		7430
Print/Stationery	800	800	800	800	800	800	800	800	800	800	800	800	9600
Repairs	150	150	150	150	150	150	150	150	370	150	150	150	2020
Training	100	100	100	100	100	100	100	100	100	100	100	100	1200
Recruitment/facility			1000			300	1500	200		1000			4000
Travel/Subsistence	250	250	250	250	250	250	250	250	250	250	250	250	3000
On costs	1247	1247	1247	1247	1247	1247	1247	1247	1247	1247	1247	1247	14964
Pension costs	497	497	497	497	497	497	497	497	497	497	497	497	5964
LLCRP Officer	833	833	834	833	833	834	833	833	834	833	833	834	10000
LLCRP on costs	49	49	49	49	49	49	49	49	49	49	49	49	588
<b>Total Expenditure</b>	16470	18635	18483	17482	17825	23083	18982	19255	17703	18482	17860	17483	221743
<b>Surplus/(Deficit)</b>	<b>15882</b>	<b>(6783)</b>	<b>(1632)</b>	<b>(630)</b>	<b>(5973)</b>	<b>9768</b>	<b>370</b>	<b>(7403)</b>	<b>9148</b>	<b>(6630)</b>	<b>(6008)</b>	<b>9368</b>	<b>9477</b>

**Appendix iii      KEY Output/outcome projections to 2010**

- **5.5 full time jobs retained : 1 full time job created.**
- **10 businesses receiving business resource support at any one time.**
- **Up to 100 businesses benefiting from retail and rural services consultancy delivery/training.**
- **Engagement with communities/public authorities to deliver aspects of Towns Centre Management including delivery of Pedestrian Surveys.**
- **Windermere Waterfronts Regeneration/enhancement projects developed towards implementation.**
- **Recognition as appropriate organisation for the delivery of local investment in conjunction with the public sector.**
- **Commission as project management body for regeneration/enhancement delivery at appropriate level.**
- **New public realm enhancement opportunities identified and progressed towards fulfilment.**
- **Lakes Futures Business Network membership developed towards minimum 100 member objective and network recognised as tangible reflection of business needs and concerns.**
- **Relocation of administrative delivery to Windermere Library.**
- **SLDT rental reinvested to deliver additional facilities into Windermere Library beyond standard County Council investment.**
- **SLDT revenue streams developed towards delivery of financial sustainability.**
- **Ongoing development of SLDT membership to enable true 'ownership' by the community.**
- **Recognition as facilitator to enable expansion of local delivery opportunity on behalf of local Town and Parish Councils.**



## **enabling, providing, challenging and securing.**

Since incorporation in July 2004 South Lakes Development Trust (SLDT) has been working to enhance the economic and community vitality of the Windermere and Lakes Parishes and is now positioned to broaden its delivery capacity within the wider South Lakes area. Trading activities commenced in November 2005.

SLDT serves these communities by directly engaging with the issues that affect their future vibrancy and development and by working in constructive partnerships with statutory and other agencies remitted to deliver to the needs of our community.

Such issues are wide ranging but include:

- retail buoyancy
- skills training
- community cohesion
- retention of public amenities
- investment and care of the public realm
- meeting wider community needs

SLDT was formed as a result of the foresight of the originating **Lakes Market Towns Partnership**. The partnership identified the opportunity presented by the establishment of an effective social enterprise capable of responding positively to community need, and through which funding secured could be cost effectively managed to maximise output effectiveness.

Working from within the community SLDT continues to manage and drive forward economic and community enhancing initiatives by seeking out and implementing innovative solutions to project delivery through a process of **enabling, providing, challenging and securing**.

South Lakes Development Trust is registered with the charities commission.

Charity number: 1108280  
Company number: 5177284

**For more information and contact details visit  
[www.sldt.co.uk](http://www.sldt.co.uk)**

## **ENABLING:**

At the centre of the **enabling** process is the **delivery** of **Town Centre Management, retail development consultancy and quality development of the public realm.**

### **Towns Centre Management**

A critical hub for the identification, development and implementation of economic and community development opportunities within the Windermere, Bowness, Ambleside and Grasmere community.

### **Retail Development Consultancy**

Specialised commissions to identify business development opportunities within the independent retailer sector in Market Towns and rural communities across the north west.

### **Windermere Waterfronts**

A innovative networked approach to developing and delivering the diverse range of public and private sector regeneration opportunities based around Windermere's Waterfront including:

- Waterhead Enhancement
- Ambleside & Waterhead Masterplan
- Ellerthwaite Square & Gardens
- Brockhole Regeneration
- The Glebe

## **SLDT also delivers direct business support and services**

### **Customer Service Training (Retail)**

Accredited Welcome Host Training to retailers in across Cumbria.

### **Book keeping/payroll management**

Professional financial support for small business/community organisations based in the South Lakes

### **"Virtual" business resource support**

Flexible provision of secretarial, general administration, telephone answering event and diary management directed towards small local businesses by cost effectively relieving the paperwork burden enabling them to concentrate on developing their business.

### **Website Development and IT support**

Website creation, onward development and fault diagnostic clinic directed at new to internet businesses or those seeking dynamic development of on line trading activities.

### **Supported workspace /training facilities**

Providing easy in /easy out managed workspace to enable new business development incubation support. Fully equipped training room facility for up to ten delegates

### **Lakes Futures Business Forum**

Responding to the needs identified by local businesses following the demise of the Ambleside Chamber of Trade SLDT established LFBF to extend business networking and lobbying opportunities.

## **PROVIDING:**

### **Solutions**

SLDT has the advantage of being located at the heart of the community in which it delivers and the ability to act as an impartial interface between the community and other key agencies.

**SLDT has identified various projects of importance to the local community and will help to find solutions to deliver and, where appropriate, manage;**

### **Public Conveniences**

Reinstatement, refurbishment and cost effective management of public conveniences through evolution of a social enterprise initiative creating training and employment opportunity in building maintenance, plumbing, electrical and associated skills.

### **Lengthsman scheme**

Installation of a “Lengthsman” scheme (working alongside the public convenience initiative) delivering a dedicated local workforce addressing issues relating to maintenance of the public realm, including street and signage cleaning etc.

### **Retail Revitalisation**

The creation of a ‘Retail Revival Company’, on a ‘not for profit’ basis will create a support mechanism to enable rural retail outlets to be supported through the provision of an innovative buying, marketing and communication network.

### **“Community Anchor”**

Creation of a “Community Anchor” incorporating Windermere Library, Ellerthwaite Gardens, Marchesi Centre and Langstone House creating an holistic community-managed anchor providing access to a range of resident, business and visitor orientated information, resource and support.

### **Community Management**

Providing the resource to enable improved and impartial engagement between community and Public Authorities via a bottom up approach owned by, and operating within, our community.

### **Nursing Care**

Supporting Bowness and Windermere Community Care Trust in their objective to provide Windermere with a 40 bed Nursing Home offering critical elements of social provision.

### **Affordable Housing**

Responding to local need by providing the platform for the establishment of a Community Land Trust, or other suitable mechanism, to deliver positive solutions to this critical issue.

### **Community Engagement**

SLDT maintains direct and open communication with the community through consultation, a ‘hands on’ approach with and willingness to engage with Community generated ideas. SLDT compiles, edits and distributes the Windermere community newsletter ***'The Hub'***.

## **CHALLENGING:**

As an independent, not for profit, company seeking to address issues directly related to improving the economic and general well being of our community we are strategically positioned to challenge decisions and management processes relating to services provided by the public sector.

We have recently presented opportunities to South Lakeland District Council that would regenerate the delivery of public conveniences, and are presently developing proposals to Cumbria County Council for the revitalisation of library facilities in Windermere.

By identifying and implementing alternative solutions to the way in which public services can be delivered we can help ensure that such provision is not only maintained, but delivered to a standard that exceeds expectation.

## **SECURING:**

Third sector, **social enterprise organisations** with charitable status, **such as SLDT**, are able to access funding not otherwise available to the public or private sector. Such opportunity can add material worth to the traditional public sector funding streams attracted towards regeneration and associated project formulation and delivery.

By upholding a 'private sector' philosophy towards achieving its outputs SLDT operates on a commercially orientated basis that enables a flexibility of delivery and response that is often not possible within the constraints of the public sector.

- Employment flexibility.
- Business flexibility.
- 'Real world' employment benefits.
- Private sector orientation towards expenditure control.
- More £'s for project delivery, less for administration

SLDT has an established trading capacity capable of generating substantial levels of revenue that is utilised to offset direct operating expenditure.

SLDT has an objective of achieving financial self sufficiency by 2010.

Over £100,000 funding support has recently been attracted from a combination of private and public sector organisations to supplement the revenue generated by the Trust thereby securing the £200,000 core costs required by the Trust in financial year to March 2009.

## **Jobs**

SLDT presently employs 5.5 full time equivalent posts and has directly assisted towards the creation of additional employment opportunities through the projects that it is delivering.

SLDT has facilitated the employment of the Lakes Line Community Rail Partnership Officer.

SLDT sees opportunity for ongoing employment creation and retention through the implementation, and onward development, of the projects identified above.



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