

## **COMMUNITY EMPOWERMENT (SCOTLAND) ACT 2015**

### **ASSET TRANSFER REQUEST FORM**

#### **IMPORTANT NOTES:**

**This is a standard asset transfer request form which can be used to make a request to any relevant authority. Relevant authorities may also provide their own forms in their own style.**

**You do not need to use this form or a relevant authority's form to make an asset transfer request, but using a form will help you to make sure you include all the required information.**

**You should read the asset transfer guidance provided by the Scottish Government before making a request. Relevant authorities may also provide additional guidance on their schemes.**

**You are strongly advised to contact the relevant authority and discuss your proposals with them before making an asset transfer request.**

**When completed, this form must be sent to the relevant authority which owns or leases the land your request relates to.**

**This is an asset transfer request made under Part 5 of the Community Empowerment (Scotland) Act 2015.**

**Section 1: Information about the community transfer body (CTB) making the request**

1.1 Name of the CTB making the asset transfer request

Leancoil Trust Ltd

1.2 CTB address. This should be the registered address, if you have one.

Postal address:

[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]

Postcode: [REDACTED]

1.3 Contact details. Please provide the name and contact address to which correspondence in relation to this asset transfer request should be sent.

Contact name: [REDACTED]

Postal address:

[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]

Postcode: [REDACTED]

Email: [REDACTED]

Telephone: [REDACTED]

We agree that correspondence in relation to this asset transfer request may be sent by email to the email address given above. *(Please tick to indicate agreement)*

*You can ask the relevant authority to stop sending correspondence by email, or change the email address, by telling them at any time, as long as 5 working days' notice is given.*

1.4 Please mark an “X” in the relevant box to confirm the type of CTB and its official number, if it has one.

<b>X</b>	Company, and its company number is ..... Scottish Charitable Organisation .....	SC654087 SC050975
	Scottish Charitable Incorporated Organisation (SCIO), and its charity number is .....	
	Community Benefit Society (BenCom), and its registered number is .....	
	Unincorporated organisation (no number)	

**Please attach a copy of the CTB’s constitution, articles of association or registered rules.**

1.5 Has the organisation been individually designated as a community transfer body by the Scottish Ministers?

No

Yes

Please give the title and date of the designation order:

1.6 Does the organisation fall within a class of bodies which has been designated as community transfer bodies by the Scottish Ministers?

No

Yes

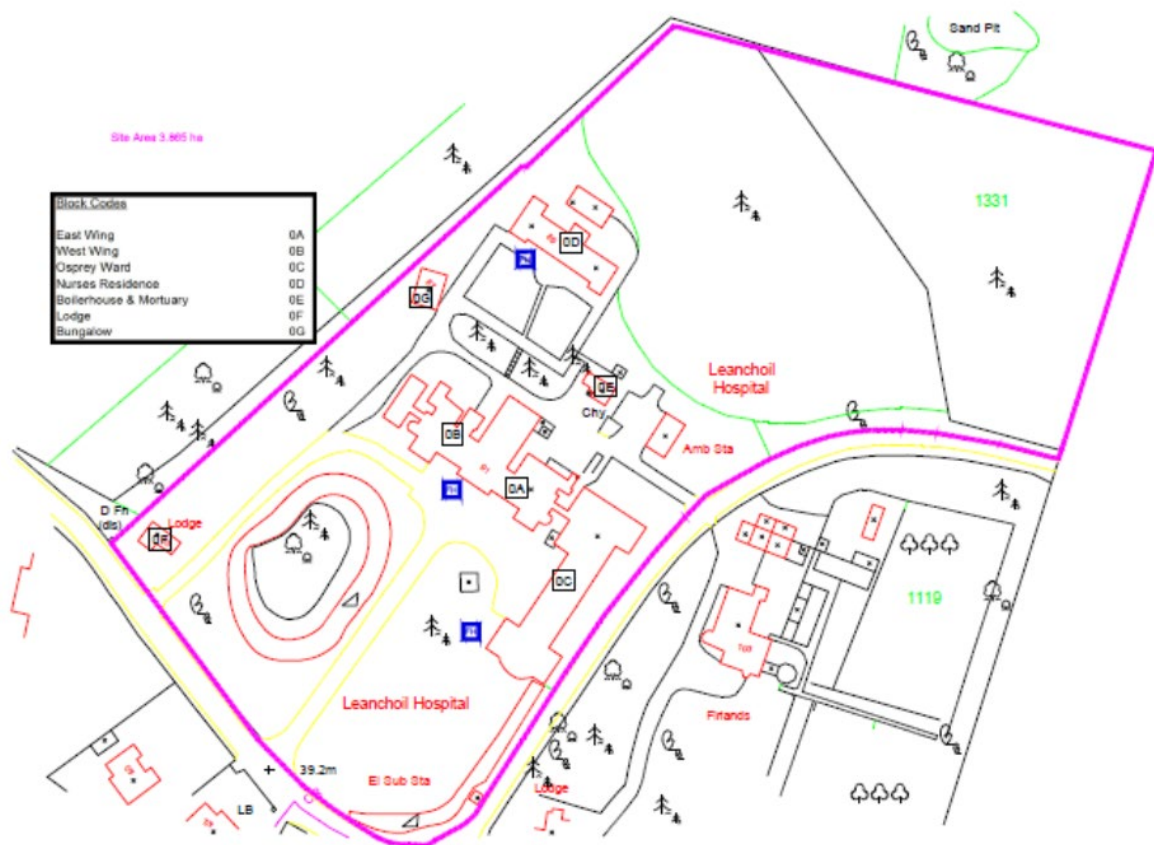
If yes what class of bodies does it fall within?

## Section 2: Information about the land and rights requested

2.1 Please identify the land to which this asset transfer request relates.

*You should provide a street address or grid reference and any name by which the land or building is known. If you have identified the land on the relevant authority's register of land, please enter the details listed there.*

*It may be helpful to provide one or more maps or drawings to show the boundaries of the land requested. If you are requesting part of a piece of land, you must give a full description of the boundaries of the area to which your request relates. If you are requesting part of a building, please make clear what area you require. A drawing may be helpful.*



The street address of Leancoil Hospital is 92 St Leonards Rd, Forres IV36 2RF. The area being requested through this Asset Transfer Request is outlined in pink above.

Officially opened in April of 1892, Leancoil Hospital has served the communities of the area for over 125 years. The construction of the hospital was largely funded by philanthropist Donald Alexander Smith, 1st Baron Strathcona and Mount Royal. Much of the other funding came from local subscriptions and many of the town residents can trace back family contributions from the board at the entrance. There is therefore a real feeling of connectedness.

In 1897 a free-standing fountain was added at the site entrance. In 1939 the hospital underwent transformation when the maternity wing and the nurses' accommodation were added as an extension and new build respectively. Parts of the complex were category B Listed in 1993. The site is located towards the South East edge of Forres on St Leonards Road, a long road of well established, predominantly residential, properties. It is almost exactly 1 mile from Forres High Street.

As significant as the buildings is their setting, which is characterised by a formal approach through a generous landscape and by the seclusion provided by mature trees along the boundaries and to the rear of the site.

The site area is 3.865 hectares (approx. 9.5 acres), which includes areas of hardstanding that can be used for car parking.

2.2 Please provide the UPRN (Unique Property Reference Number), if known.

*If the property has a UPRN you will find it in the relevant authority's register of land.*

UPRN: 133001017

### Section 3: Type of request, payment and conditions

3.1 Please tick what type of request is being made:

for ownership (under section 79(2)(a)) - go to section 3A

for lease (under section 79(2)(b)(i)) – go to section 3B

for other rights (section 79(2)(b)(ii)) - go to section 3C

#### 3A – Request for ownership

What price are you prepared to pay for the land requested? :

Proposed price: ██████████

Please attach a note setting out any other terms and conditions you wish to apply to the request.

#### 3B – request for lease

What is the length of lease you are requesting?

How much rent are you prepared to pay? Please make clear whether this is per year or per month.

Proposed rent: £                      per

Please attach a note setting out any other terms and conditions you wish to be included in the lease, or to apply to the request in any other way.

### 3C – request for other rights

What are the rights you are requesting?

Leancoil Trust seeks to take ownership of the entire Leancoil site. The Trust will retain the original listed hospital building and grounds between it and St Leonard's Road together with the listed Gate Lodge and will also retain the protected woodland to the East of the hospital. The land between the original building, including the former maternity wing, laundry building, ambulance station and nurses' home will be sold for ██████████ to an RSL or RSLs for development of supported living accommodation. For a full description of the proposed transactions see Appendix 1

Do you propose to make any payment for these rights?

Yes

No

If yes, how much are you prepared to pay? Please make clear what period this would cover, for example per week, per month, per day?

Proposed payment: £                      per

Please attach a note setting out any other terms and conditions you wish to apply to the request.

## Section 4: Community Proposal

4.1 Please set out the reasons for making the request and how the land or building will be used.

*This should explain the objectives of your project, why there is a need for it, any development or changes you plan to make to the land or building, and any activities that will take place there.*

### Reason for ATR

The reason for this asset transfer request is to acquire, conserve and re-purpose the Category B listed Leancoil Hospital and its grounds for the community and is explained in detail in the Masterplan at Appendix 2. The proposal will address the following issues:

- the potential loss of a listed building, grounds, and protected woodland
- shortage of adapted housing as identified in Moray Council's Local Housing Strategy 2019-2024
- increasing numbers of journeys to attend outpatient appointments at Aberdeen Royal Infirmary, which is a 5-hour round trip.
- reduced access to secondary and tertiary medical care
- lack of support for the local veteran population

The project meets the following National Performance Framework outcomes:

- We live in communities that are inclusive, empowered, resilient and safe. The Leancoil Centre, Gate Lodge and grounds will be owned and managed by residents of the Forres Academy Catchment Area in partnership with Erskine.
- We are healthy and active. Through social prescribing, medical practices will be able to prescribe activities ranging from physiotherapy, gardening, woodland maintenance, complementary therapies, various forms of exercise and many others at Leancoil.
- We value, enjoy, protect, and enhance our environment. 2.5 ha of protected woodland will be maintained and made more accessible for Leancoil residents, veterans, and the wider community.
- We support thriving and innovative businesses through a collaborative and resilient business model which creates synergy between public bodies, national and local charities, RSLs and social enterprises.
- We tackle poverty by sharing opportunities more equally through supported accommodation, making NHS treatment more accessible through affordable physical and mental health activities



Leancoil Hospital will be renovated and repurposed as a community health and wellbeing hub and the grounds and woodland will provide amenity space to support this. Other buildings on site will be developed for supported living accommodation thus creating a micro health village. This innovative plan has developed over the last 2 years and is still being refined, such is the complex and ambitious nature of the proposal.

Leancoil hospital opened in 1892 and was funded by substantial donations from Lord Strathcona, who was born in Forres, and subscriptions from many other benefactors both local, national, and international as documented in annual reports held in NHS Grampian archives. From its inception as a community funded hospital, Leancoil has 'belonged' to the people of Forres. When it was closed by NHS Grampian in 2018 Forres Community Council (FCC) identified a high likelihood that Leancoil would be lost to the community unless action was taken.

FCC commissioned a feasibility study in 2019 to scope out a potential future for the hospital. This included a Fabric Survey , Public Consultation and Design Options (Appendices x, y, z respectively). The public consultation demonstrated a real desire amongst the community to save the hospital with the top four uses for the hospital identified as health and wellbeing, veterans' rehabilitation, retirement living and community use. Following the study, a group of local people came together to form Leancoil Trust which became a Company Limited by Guarantee (SC654087) in February 2020 and obtained charitable status (SC050975) in May 2021. The Articles of Association are at Appendix 3.

In 2018 an approach was made by Erskine, the veterans' charity, who were exploring the feasibility of creating a veterans' activity centre outside of the central belt following the success of their inaugural facility, the Erskine Reid Macewen Activity Centre (ERMAC) in Bishopton. Moray has a higher than average population of veterans and armed forces community, and Erskine's approach presented the possibility of forming a key partnership for taking the Leancoil project forward.

Leancoil Trust commissioned a Community Impact Assessment (Appendix 4) in February 2020 to obtain views on the potential impact of the community asset transfer (CAT) and subsequent development of the former Leancoil site. This reiterated the very strong local support for the CAT and the many benefits that could emerge from transformation into a facility for health and wellbeing. Erskine commissioned a separate survey to investigate the demand for veterans' support in the area (Appendix 5).

Then the Covid pandemic hit. Erskine's priorities had to focus on caring for the veterans in their care so put a hold on their involvement in the project. Consequently, Trustees took the difficult decision to do the same. However, this pause allowed for a period of reflection and the project was reviewed and a new, more sustainable plan emerged. This forms the basis of the new Masterplan attached. The original hospital

building, grounds and woodlands will be retained by Leancoil Trust. The hospital will be transformed into a health and wellbeing centre and the open gardens and woodland used for a range of outdoor activities. All other buildings on site, except for the Gate Lodge, will be developed to provide up to 70 units of supported living accommodation which is key to the success and future sustainability of the plan for the Leancoil site. In brief the proposal is that ownership of these buildings will be transferred to one or more registered social landlords appointed by Moray Council. The transfer process will provide the funding for the purchase of the site from NHS Grampian set at [REDACTED], design and consents to planning permission and upgrading of the site's infrastructure. The transaction route for the disposal of the buildings is at Appendix 1.

Since lodging an expression of interest with NHS Grampian in 2018 Leancoil Trust has worked closely with NHS Grampian Property Manager on negotiating the path to submitting a comprehensive and realistic asset transfer request. These negotiations have been open and transparent and have enabled Leancoil Trust to address potential challenges to the process along the way.

## Benefits of the proposal

4.2 Please set out the benefits that you consider will arise if the request is agreed to.

*This section should explain how the project will benefit your community, and others. Please refer to the guidance on how the relevant authority will consider the benefits of a request.*

Leancoil will be renovated and revitalised as the Leancoil Health and Wellbeing Village: a complex with the Leancoil Centre at its heart, an Erskine Veterans' Activity Centre and supported living accommodation as visualised in Appendix 6.

This proposal will bring benefits to the community of the Forres Academy catchment area through improvements in:

- economic development
- regeneration
- public health
- social wellbeing
- environmental wellbeing

### Economic Development and Regeneration

The project is centred on the regeneration of the redundant hospital and grounds as previously detailed. As part of the regeneration the listed hospital building, and Gate Lodge will be renovated and repurposed. The Leancoil site is identified as a development opportunity in Moray Local Development Plan 2020 [Settlement Statement for Forres](#) (Page 209) with suitable uses as 'Health Care or appropriate Residential/Business/Community/Tourism uses suited to amenity of the site' which also makes it clear that the listed buildings, open aspect and tree preservation order (TPO) must be retained and safeguarded. This proposal satisfies all these requirements.

It is anticipated that a range of employment and volunteering opportunities will be created through the construction phase and the management and running of the completed site.

An Options Appraisal - Business Planning Considerations (Appendix 7) was conducted in 2019. Although based on the original business model, this estimated that employment generated in the construction period would give a range of impacts of 60-100FTE years for Moray and 90-150 FTE years for Scotland.

The Erskine operation would generate approximately 14 FTE in Moray. Site and building maintenance and managing the Erskine lease would equate to 2 FTE.

Other employment opportunities that will be generated over the life of the project are likely to include a minimum of:

- Café staff: catering manager/cook, kitchen staff, front of house staff
- Supported living accommodation: care staff, cleaners and building maintenance
- Self-employment opportunities for tenants of the Leancoil Centre including gym/exercise instructors, complementary therapists, and other service providers

The same report identified potential voluntary input as 4-6 volunteers per day supporting the EVAC and wellbeing centre (indoor and outdoor services). Volunteer time will also be contributed to the 'Our Leancoil' history project for research and photography activities. In the medium to long term volunteer time will also be required for raising charitable funding and donations. Considerable community involvement is also anticipated to support other routine and special events and activities.

#### Public Health, Social and Environmental Wellbeing

Leancoil Trust, with funding from HIE, has recently commissioned [Social Value Lab](#) to evaluate the social value of the project and this will illustrate the savings that could be achieved over time for NHS Grampian and other public services as well as the wider benefits that will be generated for the community. The contract brief is at Appendix 8 and the report will be available at the end of March 2022.

The vision is that Leancoil will support and inspire the community to improve their health and wellbeing through:

- the creation of a sustainable community health and wellbeing centre in the renovated and repurposed main hospital building
- the development of supported living accommodation on the footprint of other existing buildings
- increased use of the grounds and woodlands
- creation of a veterans' activity centre

#### Health and Wellbeing Centre

A priority for Scottish Government and NHS Scotland is to keep people out of hospital and in their own homes for as long as possible. [Healthcare Improvement Scotland's Help@Home](#) key points for guiding principles states that:

*Hospital at Home works best when it is part of an integrated acute and community-based service model to meet local population need.*

This requires alternative and innovative thinking in terms of provision of intervention and prevention services at a local level, particularly in rural locations, and Leancoil can become an integral part of a future service model for the Forres area. It can also help address other NHS pressures such as excessive health miles (reduced carbon footprint) resulting from patients attending consultations at Aberdeen Royal Infirmary (a 5-hour round trip) and hospital parking.

Working with Moray Health and Social Care Partnership, opportunities are being explored to provide clinical space with modern facilities and reliable IT to enable easier access to secondary and tertiary medical care for the community:

- efficient remote consultations with specialists in Aberdeen and Inverness thus reducing health miles and reducing inequalities of access to services for those in rural locations
- prehabilitation services – physio, dietary advice, occupational therapy to prepare people for surgery and potentially reduce the time spent in hospital
- clinical ‘overflow’ for Forres Health Centre e.g. blood tests, pulmonary rehab. Moray Local Development Plan 2020 Settlement Statement for Forres indicates the number of GPs at Forres Health Centre will be increased as part of infrastructure developments, and this will increase pressure on available space in the Health Centre

Space for third sector (charity) partners is planned. Discussions have been held with, amongst others, Penumbra, Children 1<sup>st</sup>, Quarriers, Moray Health and Wellbeing Hub, Age Scotland and early indications are very positive. The opportunity to work alongside other support organisations in one place would facilitate a more holistic approach for clients’ care who may need to access more than one service. Leancoil would enable this, and partners would have the opportunity to influence the layout and decor of the space to meet their needs.

At the heart of the Leancoil Centre will be a welcoming and inclusive café which will be open to all: residents, 3rd sector partners for informal gatherings, Erskine veterans, service providers and users, and the public.

#### Supported Living Accommodation

[Moray Council’s Housing Strategy \(2019-2024\)](#) Priority 3 states:

*The HNDAs 2011 and 2017 both found a shortage of housing with appropriate design features and adaptations to meet the needs of a range of households, including older people, people with disabilities and/or vulnerabilities, people who*

*need supported or other specialist housing for households to meet their specific needs.*

The supported living accommodation planned for Leancoil will help to address this shortage. To further evidence the need, Leancoil Trust has commissioned [Rural Housing Scotland](#), again funded by HIE, to carry out an assessment of housing need in Forres. The contract brief is at Appendix 9 and the report on this research will be available at the end of February 2022.

Residents will benefit from purpose built accommodation and will have access to onsite facilities, opportunities for socialising, employment, and a range of volunteering roles (gardening and grounds maintenance, café, 3<sup>rd</sup> sector partner support, EVAC) as well as access to medical care services. This will help address the challenges of isolation and loneliness that many older people are experiencing as a result the Covid pandemic, but also reduce the stress of travelling to Aberdeen or Inverness for consultations.

### The Grounds

This project will maintain and enhance the protected woodlands and grounds which offer excellent amenities to support health and wellbeing through gardening, exercise, outdoor nurseries, projects, and events. By working in partnership with the local GP surgeries there is the opportunity to develop a social prescribing service to help people to find different, more personalised, ways to improve their health and wellbeing. Discussions have been held with a food growing project located close to Leancoil with a view to developing a partnership. The site is well positioned to link into local footpath and cycling networks. Discussions have also been held with Earth Time about potential use of the woodland to run an outdoor forest school children's nursery.

### Erskine Veterans' Activity Centre

The ERMAC in Bishopton near Glasgow has proved extremely successful as shown in Appendix 10. It supports veterans of all ages and has influenced a change in strategic direction for the charity to increasing support of veterans in their own communities. The population of veterans and armed forces community in Moray is above average for Scotland. Although difficult to quantify precisely due to insufficient data sources, using those that are available it is estimated the armed forces community make up a minimum of 17% of the population and this is likely to increase with the expansion of both RAF Lossiemouth and Kinloss Barracks.

Erskine are keen to develop activity centres in other areas of Scotland and with no similar dedicated services for veterans in north Scotland, Leancoil provides an ideal opportunity to 'test the water'. Erskine commissioned a consultation with local veterans to evidence further the need for a centre in Moray and this is at Appendix 5.

Their intention is to take out a long-term lease (20-25 years) and as an anchor tenant this will provide surety of income for the Centre.

Erskine have indicated a desire to open an activity centre ahead of the main hospital availability and Leancoil Trust are currently pursuing with NHS Grampian a proposal for a short term lease of the Nurses' Home at Leancoil to accommodate a temporary Erskine Veterans' Activity Centre. This illustrates the commitment of Erskine to the project, and they are in the process of approving expenditure of [REDACTED] to upgrade the facility. It also enables Erskine to pilot the facility ahead of moving into the larger premises of the Leancoil Centre. If all goes according to plan this facility will open in September 2022.

## **Restrictions on use of the land**

4.3 If there are any restrictions on the use or development of the land, please explain how your project will comply with these.

*Restrictions might include, amongst others, environmental designations such as a Site of Special Scientific Interest (SSI), heritage designations such as listed building status, controls on contaminated land or planning restrictions.*

The original hospital building, Gate Lodge and fountain are category B listed. The proposed masterplan concept has received a positive response from Historic Environment Scotland (HES).

The site is identified as an 'opportunity' type site in Moray Council's Development Plan 2020. The proposed Masterplan concept has received a positive response from Moray Council planners.

The trees on site are covered by a [TPO](#) and should be safeguarded from development. The open aspect to St Leonards Road should also be retained.

Leancoil will continue to work closely with both HES and Moray Council planners as the project develops.



## Negative consequences

- 4.4 What negative consequences (if any) may occur if your request is agreed to?  
How would you propose to minimise these?

*You should consider any potential negative consequences for the local economy, environment, or any group of people, and explain how you could reduce these.*

1. Impact on immediate neighbours: perception of risk of antisocial tenants, loss of woodlands, traffic.

Measures to be taken:

Regular public engagement will be conducted before, during and after the application process is completed and issues raised acknowledged and mitigated where feasible. Response at public meetings has been favourable towards supported living accommodation.

As a TPO covers the whole of the Leancoil site and surround area, there would be no loss of woodland caused by the proposal.

2. Displacement impacting on local businesses.

Measures to be taken:

Although LT plans to have a café which will be open to everyone, we anticipate that the majority its users will be from the EVAC, attendees of the Leancoil Centre, staff and residents on the site. As such it will have a very different customer base to the town centre cafes which are approximately 1 mile away therefore displacement of customers will be minimal.

There are several alternative and complementary therapists with existing businesses in Forres. Business owners have been contacted already and continuing updates will be provided on the project. It is hoped that some may rent space as their services are seen as complementary to medical services that will be on offer at Leancoil.

3. Increased traffic on St Leonard's Rd, Forres

Measures to be taken:

Planning permission will include a traffic impact assessment.

4. Loss of heritage – Conservation Deficit - of the former hospital and its grounds.

Measures to be taken:

All listed buildings, structures and the grounds will be retained. Experienced contractors will be working on the listed buildings, and their renovation and adaptation overseen by Historic Environment Scotland. The history, both written and oral, of Leancoil Hospital will be recorded by the Trust's history project 'Our Leancoil' which will involve the community. This will increase both the quality and quantity of the heritage collection relating to Leancoil and will be more widely available to the community. Collaboration with NHS Grampian Archivist, Aberdeen University Wolfson Library, and staff from the history department at UHI is ongoing.

#### 5. Displacement of staff and volunteers from existing local organisations

Measures to be taken:

Identification of anticipated roles will be addressed through the strategic plan and Leancoil Trust will communicate and build early relationships with organisations that provide employment support across Moray. The partnership with Erskine and links to the military base in Kinloss will promote opportunities for veterans in the EVAC which might be a source of new volunteers. The Trust will build on already good working relationships with local third sector organisations who rely on volunteers.

## Capacity to deliver

4.5 Please show how your organisation will be able to manage the project and achieve your objectives.

*This could include the skills and experience of members of the organisation, any track record of previous projects, whether you intend to use professional advisers, etc.*

Leancoil Trust has 8 Trustees who have a wide range of relevant skills, knowledge, and a wealth of experience uniquely suited to deliver this project. Board members have been instrumental in the successful completion of a range of large scale conservation and regeneration projects.

The Trustees have extensive expertise in the fields of business development and management, community affairs, health and medicine, design and construction, armed forces & veterans, implementing funding programmes, fundraising, and managing regeneration projects. Further information can be found in the CVs of Trustees which are included in Appendix 2.

A recent skills audit has been conducted and where gaps have been identified measures are being taken to address these either by recruiting trustees with specialist skills, for example, legal experience, or by contracting the services of specialists.

In February 2021 the Trustees appointed a development officer to help with the process of the community asset transfer and development planning for the Trust. From initial contract specification the role has evolved along with the project, and it has recently been identified that further support is necessary.

In November 2021, Highlands and Islands Enterprise agreed to provide direct funding of ████████ for development funding for 14 months. This equates to 60% of estimated development expenditure and Leancoil Trust will raise the remaining 40% through an application to Architectural Heritage Fund, other funds and some from its own reserves. This funding will cover:

- Development officer – 14 months further funding to concentrate on public and stakeholder engagement, Trust development, asset transfer request and fund raising.
- Rural Housing Scotland to conduct a housing needs and assessment survey as requested by Moray Council. Report due end of February 2022.

HIE have also commissioned the following services through direct contracting:

- Community Enterprise Ltd (CEL) to update and refine the Masterplan including financial forecasting, business planning and assistance with fundraising from large grant makers.
- Social Value Lab to assess the social value benefits that will accrue from the project and to justify the [REDACTED] discount on value price agreed by NHS Grampian. This will provide a monetary value against which to assess the savings the project will accrue for NHS Grampian over time. Report due end of March 2022.

A specialist will be commissioned in due course to advise on VAT liability.

### Governance and Accountability

The Articles of Association for Leancoil Trust at Appendix 3. It is a membership organisation and can have up to 15 Trustees. The Board currently comprises 8 Trustees with experience, knowledge, and expertise to support this proposal in the short and long term. There is a nominated chair, president and treasurer, and Board meetings are held every 4 weeks, or more frequently if required. These are fully recorded in notes of meetings which are subsequently approved by the Board. The first Annual General Meeting will be held in January 2022.

As an infant organisation, Leancoil Trust has just launched its membership programme in tandem with its new website ([Leancoil Trust](#)). The aim is to have 200 members by the time of the CAT. Ordinary members, who must be resident in the Forres Academy catchment area, will be entitled to nominate candidates for election to the board and vote at future AGMs. Following submission of the asset transfer request and hopefully positive decision notice from NHS Grampian a targeted membership campaign will be conducted to increase the number of members.

The Development Officer is working on policies required for the competent running of the charity and these include:

- Data Protection Policy
- Grievance Policy
- Conflict of Interest Policy
- Equality and Diversity Policy
- Risk Management Policy
- Volunteer Policy

On successful completion of the CAT other policies will be drawn up as required.

## Monitoring and Evaluation

The Board has recently undertaken a strategic planning exercise to identify tasks for the next 2 years. These are being consolidated into a project plan which covers:

- the management, administration, and development of Leancoil Trust
- the CAT
- fundraising
- management of the Erskine partnership
- development of the Leancoil Centre.

Progress will be monitored regularly and reported to monthly Board meetings.

## Effective Partnerships

The complex nature of the proposal has resulted in many key partnerships being developed both in relation to the transfer of ownership of the site and buildings and to the development of the Leancoil Centre. Appendix 1 details the partnership with Erskine, [REDACTED] and was provided to NHS Grampian in October 2021. An approach has been made to Veterans Housing Scotland in their capacity as a Registered Social Landlord. Leancoil Trust has received letters of comfort from NHS Grampian, Erskine and Moray Council outlining their commitment to the project. (Appendices 11, 12, 13) Leancoil Trust has taken a collaborative approach to planning for the future of Leancoil, and it is anticipated that further partnerships will be developed.

**Community.** The community were first consulted on the project in 2019 as part of the initial feasibility study conducted by LDN architects. The Leancoil Public Consultation Report is at Appendix 14 and concluded that there is overwhelming support for Leancoil to be saved and ownership transferred to the community.

Appendix 4 is the report from the Community Impact Assessment which was carried out in February 2020. Support for a community asset transfer was reaffirmed and the community indicated it wanted Leancoil to be used for health and wellbeing purposes.

In November 2021, following the sustained period of Covid-19 restrictions, Leancoil Trust ran a programme of public engagement events to inform the community of updates to the project. It also provided an opportunity to ascertain continued support for the CAT. The report is at Appendix 15 and of those who attended all were in favour of the CAT and none against.

A new website has been launched and a Facebook page created to keep the community updated on progress and a further programme of engagement is planned for 2022.

**NHS Grampian.** Since the submission of the expression of interest, Leancoil Trust has formed a close working relationship with NHS Grampian. Ongoing dialogue has raised potential issues that might affect the progress of the CAT, which has allowed Leancoil Trust to address these before submitting the asset transfer request. Dialogue has been open and transparent, and Leancoil Trust has benefitted greatly from advice provided.

**Moray Council.** Moray Council are responsible for managing the Strategic Housing Investment Plan (SHIP) on behalf of Scottish Government. This sets out how investment in affordable housing will be directed over the next 5 years to achieve the outcomes relating to affordable housing detailed in the Local Housing Strategy. Leancoil Trust is working with Moray Council's SHIP manager and has received assurances that the development of supported living accommodation will be included in future SHIPs (see Appendix 13). The Moray Council Housing Strategy and Development Manager is participating in an evaluation of the social value of the project in December 2021 which will monetarise the value that the Leancoil project will accrue in the future and savings to NHS Grampian by transfer to the community.

**Moray Health and Social Care Partnership (MHSCP).** Forres Health Care Centre houses the two Forres GP practices in Forres as well as community health and social services. [Moray Local Development Plan 2020](#) (MLDP 2020 Vol 2) settlement statement for Forres indicates that there will need to be an expansion of GP services to accommodate the increasing population resulting from development. Consequently, there will be pressure on space in the Health Care Centre. Discussions are in progress with the MHSCP Locality Manager to identify services that could be relocated to Leancoil.

**3<sup>rd</sup> Sector Partnerships.** Initial discussions have been had with the following 3<sup>rd</sup> sector organisations that are active in Moray and support health and wellbeing:

Quarriers, Penumbra, North East Sensory Services, Moray Wellbeing Hub, Age Scotland, Alzheimer Scotland, Children 1<sup>st</sup>, SAMH, and Earthtime.

All have indicated an interest in being kept up to date with project development with a view to future involvement and potential space in the Centre.

**tsiMORAY.** Leancoil Trust has become a member of tsiMORAY and regularly accesses its support and advice services.

The involvement of major independent partners (Erskine, [REDACTED]) ensures the success of the project does not rely on one organisation which provides a level of sustainability to the plan.

In considering capacity to deliver, it is important to acknowledge risk and mitigation as part of successful delivery. The risks associated with the project are outlined below:

Risk	Existing Controls	Action required
Challenging negotiations with the NHS over the sale	Strong relations and regular meetings with senior NHS Grampian property manager and Locality Manager (Forres) Moray Health and Social Care Partnership.	Meet NHS officials with robust business plan
NHS Grampian demanding an excessively high price	Liaison with NHS officers following independent valuation	Potential support from senior health officers. Cabinet Secretary also interested and positive about the concept
Erskine not committing to being an anchor tenant and partner	Letter of intent to partnership and commitment to a 20-25 year lease. Lease of Nurses' Home for 5 year period ahead of opening of main building. Monthly update meetings held with Erskine's senior management team.	Continued communication and collaboration
Housing Associations not agreeing to develop	Negotiations with Moray Council Housing Department. Letter of comfort outlining support of proposals. Commitment to include Leancoil proposal in future SHIP	Mothballing the site or developing future affordable housing centrally
Renovation costs higher than expected for the hospital building	n/a	Commission architect and QS Phase the development Allow for contingencies Review scope of project
Inability to secure funding to cover renovation costs.	Potential funders identified and eligibility checks complete	Start early consultation with major funders. Phase renovation programme Review scope of funding
Costs are not covered by income generated	Extensive community consultation involving everyone in the community of all ages	Realistic cashflow forecasting to ensure the level of income needed to cover costs is understood
Difficulty recruiting volunteers or Friends Members	The community supports this project, and we feel confident we'll get help from local people already interested in the project	Continued marketing Collaboration with other community organisations Setting the Friends up autonomously will give them lead responsibility

Project not supported by local community	Currently highly supportive	Encouraging more local people into influence and governance
Loss of Key Personnel, Volunteers and Board Members	n/a	Write a succession plan Good terms and conditions for future staff Continued CPD for staff and board
Difficulty recruiting staff, particularly medical and care staff, hospitality, and servicing staff.	n/a	Work with Moray HSCP, Visit Moray Speyside, Moray Council, DWP, Developing Young Workers and apprenticeship schemes, Moray College UHI.
Insufficient reserves to manage cashflow	Passionate vision	Continue to build reserves through income generation, fundraising and grants Loan funding

Of note is the risk of renovation costs being higher than estimated and insufficient funding being secured to cover these costs. The construction industry is currently experiencing a rise in costs due to external factors such as Brexit and the Covid pandemic and, although this trend is likely to continue, it is hard to predict by how much. Mitigation could be to phase the development; however, this will undoubtedly lead to even higher construction costs. There is potential to review the scope of the project, for example, by not developing an upper floor. The 5-year lease of the Nurses' Home to Erskine also gives some flexibility to the completion time of the main building allowing more time to secure additional funding if needed.

Funding applications can only be assessed on conditions at the time of application so it is not possible to accurately determine at this stage if all the funding can be secured. However, should a longer period be required to raise funds the renovation work could be delayed, providing sufficient resources could be secured to make the building wind and water tight. Indeed, the Trust anticipates there will be a deterioration in the fabric of the building and will be seeking funding to address this once ownership is secured.



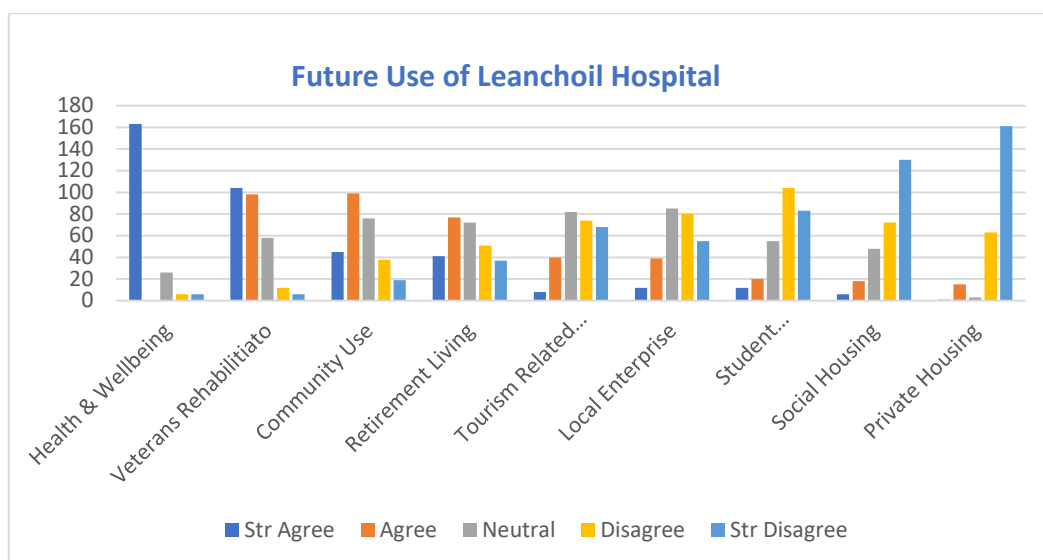
## Section 5: Level and nature of support

5.1 Please provide details of the level and nature of support for the request, from your community and, if relevant, from others.

*This could include information on the proportion of your community who are involved with the request, how you have engaged with your community beyond the members of your organisation and what their response has been. You should also show how you have engaged with any other communities that may be affected by your proposals.*

Since the concept of saving Leancoil was first mooted, the community have been involved in influencing the future of the site. The following summarises rounds of consultation and engagement that have been conducted.

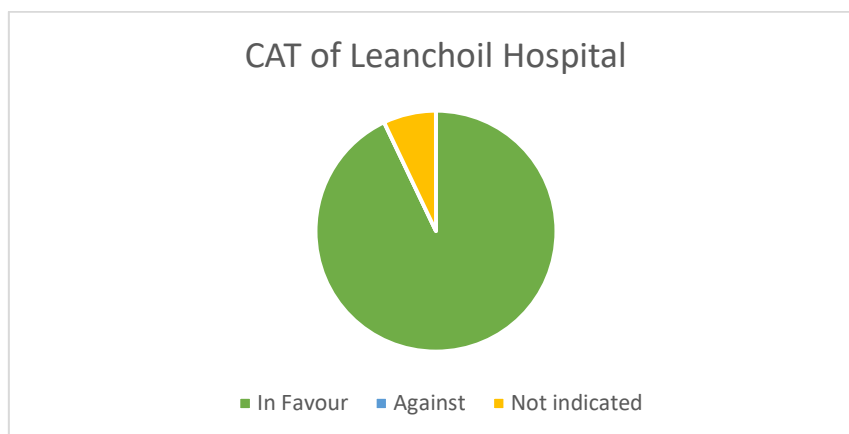
1. A public consultation was conducted by LDN Architects in 2019 to identify potential future use of the site (Appendix 14). A total of 109 attended the consultation event, 59 completed feedback forms and 228 people completed online feedback forms. This research concluded that the four most favourable options for potential future use are: health and wellbeing, veterans' rehabilitation, community facilities and retirement living.



2. Forres Area Community Trust (FACT) and tsiMORAY were commissioned by Leancoil Trust to undertake a Community Impact Assessment in February 2020 (Appendix 4). Participants in the CIA included 126 students from Forres Academy, 46 from Forres OAP's association and 120 people who attended the open meeting. The conclusion of the CIA is that there is very strong local support for the Community Asset Transfer plans, with respondents and participants identifying a broad range of potential benefits from community ownership and management of Leancoil.
3. In September 2020 Erskine commissioned FACT and tsiMORAY to conduct a survey to establish the demand for a veteran's activity centre (Appendix 5).

462 individuals completed the survey, 332 were ex-servicemen or women. A high percentage were over the age of 55 and living less than 30 miles from Forres. Almost all respondents agreed that the centre could make a real difference to the lives of veterans in the area.

4. Leancoil Trust carried out a programme of engagement events in November 2021 to update the community on progress with the Leancoil project and the report is at Appendix 15. A total of 113 people attended over 3 events and 105 of these indicated their support for the community asset transfer.



The research being undertaken by Rural Housing Scotland on behalf of Leancoil Trust will involve consulting residents of the Forres area on their housing needs and demands. Results of this will be available at the end of February 2022.

Key partners Erskine, NHS Grampian and Moray Council have all provided letters of intent/comfort regarding the proposal and these are at appendices xxx

Forres Ward Councillors have been regularly updated on the proposal, most recently in mid-November and have indicated strong support for the proposal.

Trustees met with Richard Lochhead, MSP for Moray, in late November and he has provided a letter of support which is at Appendix 16. He will also make representation of the project to the Cabinet Secretary for Health and Social Care.

The history of Leancoil Hospital is of great importance to the people of the Forres area and Leancoil Trust has been awarded funding from Berry Burn Community Fund and National Lottery Heritage Fund for a history project entitled 'Our Leancoil' which will capture the oral history of those with a connection to Leancoil. The collection along with material from NHS Grampian archives will be used to create an online exhibition to tell the social history of the hospital. Intergenerational storytelling activities will encourage young and old to come together to share experiences. Launched in November, there is already great enthusiasm in being involved from people who worked and were patients there. This project will facilitate continuous engagement with the community over the next year.

## Funding

5.2 Please outline how you propose to fund the price or rent you are prepared to pay for the land, and your proposed use of the land.

*You should show your calculations of the costs associated with the transfer of the land or building and your future use of it, including any redevelopment, ongoing maintenance and the costs of your activities. All proposed income and investment should be identified, including volunteering and donations. If you intend to apply for grants or loans you should demonstrate that your proposals are eligible for the relevant scheme, according to the guidance available for applicants.*

### Capital Funding

The proposed price of the land is [REDACTED] and this will be funded through a series of back-back transactions which cover the sale of the land to be developed for supported living accommodation and which are detailed in Appendix 1. This will also provide the funding for design and consents to planning and upgrading of the whole site's infrastructure.

Capital costs for the renovation of the Leancoil Centre are estimated to be [REDACTED] based on a budget cost estimate completed in October 2020 by Torrence Partnership, Quantity Surveyors which as at Appendix 17.

The large value funds that will be targeted for capital funding are:

Regeneration Capital Grants	[REDACTED]
Heritage Lottery Fund	[REDACTED]
Auchernack Trust	[REDACTED]
UK Gov – Community Ownership Fund	[REDACTED]
HIE	[REDACTED]
Historic Environment Scotland	[REDACTED]

The detailed breakdown of capital fund raising is at Appendix 18. The grant giving schemes listed are those that the project would be eligible to apply for and where available pre-application eligibility checks have been successfully completed.

Leancoil Trust has recently applied for [REDACTED] from the Auchernack Trust which supports projects for the elderly in Forres. A decision on this award is expected in December 2021.

### Leancoil Centre Income Generation and Sustainability

Leancoil Trust will operate the site commercially, securing Erskine, Moray Health and Social Care Partnership services and a Café provider as core anchor tenants

and negotiating with local community and third sector organisations to become future user groups and tenants. This will be the core of its sustainability.

The high level income generation for the Leancoil Centre is shown below. This is based on Erskine paying a commercial rent for the EVAC and contributing towards the capital renovation to an estimated total of [REDACTED]. Full cash flow projection from opening for the running of the Leancoil Centre. Is in Appendix 2.

[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

**Signature**

Two office-bearers (board members, charity trustees or committee members) of the community transfer body must sign the form. They must provide their full names and home addresses for the purposes of prevention and detection of fraud.

This form and supporting documents will be made available online for any interested person to read and comment on. Personal information will be redacted before the form is made available.

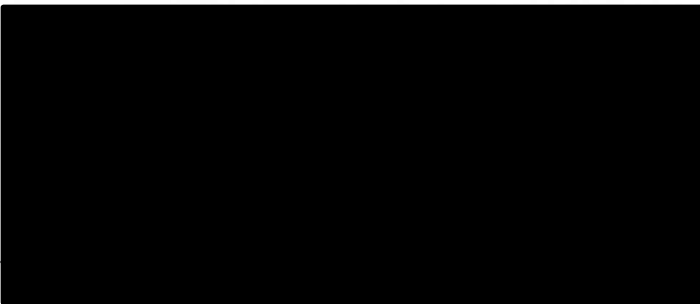
**We, the undersigned on behalf of the community transfer body as noted at section 1, make an asset transfer request as specified in this form.**

**We declare that the information provided in this form and any accompanying documents is accurate to the best of our knowledge.**

Name  
Address  
Date  
Position  
Signature



Name  
Address  
Date  
Position  
Signature



## Checklist of accompanying documents

To check that nothing is missed, please list any documents which you are submitting to accompany this form.

LEANCHOIL TRUST ASSET TRANSFER REQUEST – DECEMBER 2021

### APPENDIX LIST

Appendix	Document Title	ATR Section			
		3C	4.1	4.5	5.2
1	Leancoil Trust Transaction Report incorporating Appendix 1 and 2 to report	3C	4.1	4.5	5.2
2	Leancoil Trust Masterplan	4.1	5.2		
3	Leancoil Trust Articles of Association (including postcode list)	1	4.1	4.5	
4	Community Impact Assessment FACT	4.1	4.5	5.1	
5	Erskine Report: Demand for a Veterans' Activity Centre (FACT/tsiMORAY)	4.1	4.2	5.1	
6	Visualisation of Leancoil HWB Village	4.2			
7	Options Appraisal 2019 – Business Planning Considerations	4.2			
8	Social Value Lab Contract Brief	4.2			
9	Rural Housing Scotland Contract Brief	4.2			
10	ERMAC Report	4.5			
11	Letter of Comfort NHS Grampian	4.5			
12	Letter of Comfort Erskine	4.5			
13	Moray Council Email dated	4.5	5.1		
14	Leancoil Public Consultation Report (LDN)	4.5	5.1		
15	Leancoil Trust Public Engagement Report 2021	5.1			
16	Letter of Support – R Lochhead MSP	5.1			
17	Torrence Partnership QS Budget Cost Estimate October 2020	5.2			
18	Leancoil Trust Funding Spreadsheet	5.2			