

THE TRANSITION FUND

We have established a Transition Fund for any individual or organisation who feels called to support our transition process financially. We are doing so because we know a well-resourced reorganisation process is critical to ensuring that all stakeholders who wish to engage in the process are able to do so, and that a more inclusive process is likely to generate better quality outputs and outcomes. More information about our transition process is provided below.

The need for a transition

On July 26th 2023, the Findhorn Foundation Trust announced that it would cease education operations on 23 September 2023 and reorganise. This was because in its current form the foundation was financially unsustainable and without this reorganisation there was a risk of insolvency. Over the last decade in particular, the global context in which the charity operates has radically changed:

- Brexit has impacted the ability of people to travel to Scotland to participate, teach and volunteer in Findhorn
- Carbon footprint awareness has impacted on people's willingness to travel, with participants seeking more local or online options and reducing attendance in Findhorn
- Covid brought new technologies that enabled people to participate online; a great opportunity to connect globally, but with consequent falls for in-person attendance at Findhorn
- Rising cost of living and particularly energy prices has made operating large physical campuses less cost effective.

Objectives of the transition

The goal of our transition is to ensure the Foundation's transformational field that has touched the lives of so many people over the last fifty years reaches many more people across the globe through the use of emerging technologies and new models of delivery.

The purpose of our transition is to create an operating model that delivers the charitable purpose of the Foundation efficiently and effectively, is inclusive of everyone, and is financially and environmentally sustainable.

What we aim to deliver

Our intention is to deliver a 32-week five-stage transition process that is 'spirit led, data informed', meaning *meditation and attunement* will be integral to every stage of the process, and that every stage will be informed by *evidence* of what has gone before in the Foundation, best practice from other organisations in the charity and social enterprise sectors, and data from our stakeholders and other respected information sources.

Stage One (October 2023): Transition Team formation and growth

We have agreed an organisational structure to support the transition process, comprising ten 10.5 FTE roles. Ten of these roles are recruited, whilst a recruitment process for the remaining 0.5 FTE roles is in progress.



Back row, L-R: Sy Balderson - Maintenance; Ann McEllin - Finance; Megan Searby - Operations; Sara Wright - Donors & Systems; Ash Balderson - Grounds & Gardens; Shaun Vincent - Fundraising; Andrew Powell - Education

Front row, L-R: Terry Gilbey - Chief Executive; Lorraine Rytz-Therault - Admin & Logistics*; Britta Schmitz - Communications & Community; Harriet Wilson - Accounting

(* Lorraine has been hired to provide 8 hours a week admin and logistics support to the transition team. In addition, Simon Stedman has been hired to provide 8 hours a week support to our Legacy Circle. Further part-time contracts are anticipated.)

Now that the team is in place, we will retreat to meditate, understand each other and the challenge before us, and, based on our spiritual heritage, plan in detail each stage of our transition plan.

To create this plan, we aim to serve Spirit in the tradition of our founders, through our three core practices - 'inner listening', 'co-creation with nature' and 'love in action'. In alignment with Eileen's life-long task of encouraging people to listen to the 'still, small voice within' and then to act upon the guidance they receive, we will listen to our own inner guidance and the guidance of our local and global community, develop our transition plan based on the insights we receive, and then in co-creation with nature and all life put our love into action to deliver this plan.

Our aspiration is that after our transition period we will be able to invite guests once more to step into our transformational field (here at Findhorn, online, or anywhere in the world), support them to strengthen their own connection to the divine and encourage them to act upon their own 'small voice within' to lead a life led by Spirit and to serve the planet. We intend to do so through the specific teachings and tools that have been proven to work over the past six decades in the Findhorn Foundation and Community and which have contributed in many ways to create a more positive future for our planet.

Stage Two (November 2023): Understanding our core and future audiences

Our intention is to understand who the Foundation is currently serving locally and globally, who else the Foundation is/should be seeking to reach, and how we can ensure these voices are heard as part of the transition process. We would like anyone and everyone who has been or could be touched by the impulse and founding principles to engage in the process regardless of time and location. Our stakeholders might include current and ex co-workers and trustees, members of the Park Ecovillage Community, NFA members in the Moray region, our Resource Person and Fellows networks, our donors (individuals and organisations), previous Foundation programme participants, statutory authorities (OSCE, UK and Scottish governments, UN), and other transformation centres.

Stage Three (December 2023 - January 2024): Understanding our 'why'

Our intention is to understand why our stakeholders still need the Foundation in the 21st Century. At the global, national and local levels, what are the key issues affecting our stakeholders that the Foundation is best placed to help them address?

Stage Four (February-March 2024): Understanding our 'what'

Our intention is to understand what our existing stakeholders, and what the world at large, needs from the Foundation at this pivotal moment. What exactly is our unique gift and contribution to the needs of the world right now?

Stage Five (April-May 2024): Understanding our 'how'

Our intention is to brainstorm operating models that will help us to understand how best we can deliver our message to benefit as many people as possible.

How will we go about the work?

We will organise a series of meditations and conversations through each stage, inviting our stakeholders to listen with us to Spirit, share and explore views on the topics under discussion, and brainstorm together on the potential ways forward for the Foundation. We will hold these meditations online and in person, at different times of the day and potentially in local languages, so that as many of our stakeholders as possible influence the transition process and outcome.

Under each stage, the transition team will capture the diversity of views generated, generate models for further discussion, and submit at least three recommendations to the Foundation's Trustees to consider, attune to and approve. The transition team will share with you the diversity of views collated, all models generated for further discussion, all recommendations shared with Trustees, and explain the rationale behind all decisions taken. Stakeholders will be invited to challenge these decisions, whilst respecting that the Trustee's decision is final.

What is in scope

We will examine at least the following:

- Our governance and management arrangements
- Our physical assets base
- Our education programme content
- Our organisational systems and structures
- Our local, national, and global and online presence
- Our relationship with:
 - The private and public sectors, other transformation centres, and our statutory authorities
 - Our global network of supporters - individuals and organisations
 - Our programme participant alumni.

What is out of scope

The founding spiritual impulse that brought the Findhorn Community into existence 60+ years ago will remain and is not part of the reorganisation. Everything we do will also remain guided by our three core principles:

1. *Inner listening* - exploring the importance of being still and going within to access the deep inner wisdom that we always carry with us
2. *Work as love in action* - everything we do, not matter how small, is an opportunity to move beyond limiting beliefs and shape a new future that is rooted in love
3. *Co-creation with nature* - discover the potent collaboration with the intelligence of nature that provides a more connected and creative relationship to all life.

Timing

The transition will commence in October 2023 and our intention is for our trustees to approve a new operating model by the end of June 2024.

What resources are needed

Following the cessation of education operations on 23 September 2023, the Foundation has reduced its monthly expenditure to approximately £50,000 per month. This suggests that £450,000 is needed to see us through the nine-month transition period. However, this total covers 'opening the new' and 'closing the old'. **We will only charge 'opening the new' to the Transition Fund.** Estimated costs for 'opening the new' are summarised over the page.

The most significant expense is human resources. We estimate each member of the transition team will contribute to 'opening the new' and 'closing the old' as follows:

Team member	'Opening the new'	'Closing the old'
Andrew	80%	20%
Sara	80%	20%
Shaun	80%	20%
Britta	50%	50%
Lorraine	50%	50%
Terry	40%	60%
Ann	20%	80%
Harriet	20%	80%
HR - vacant	20%	80%
Megan	20%	80%
Ash	10%	90%
Sy	10%	90%

We will charge staff time to the transition fund using the above allocations and review these allocations every 30 days.

<u>Transition Fund</u>		Oct	Nov	Dec	Jan	Feb	Mar	Apr	Total
Staff costs - current staff	10.5 FTE	9,887.51	9,887.51	9,887.51	22,337.58	22,337.58	22,337.58	22,337.58	119,012.83
Staff costs - building out from February						3,865.60	12,340.60	8,865.60	25,071.79
Consultancy costs - FF subcontractors	£6,776.50	1,209.50	1,209.50	1,209.50	787.00	787.00	787.00	787.00	6,776.50
Consultancy costs - external contractors	£55,825.00	7,975.00	7,975.00	7,975.00	7,975.00	7,975.00	7,975.00	7,975.00	55,825.00
Project costs	£8,000.00	0.00	0.00	0.00	0.00	5,000.00	1,500.00	1,500.00	8,000.00
Overheads	£8,700.00	700.00	700.00	700.00	1,650.00	1,650.00	1,650.00	1,650.00	8,700.00
	<u>£79,301.50</u>	<u>£19,772.01</u>	<u>£19,772.01</u>	<u>£19,772.01</u>	<u>£32,749.58</u>	<u>£41,615.17</u>	<u>£46,590.17</u>	<u>£43,115.17</u>	<u>£223,386.12</u>

Notes

1. Salaries for the transition budget are calculated as a % of each employee's time spent on transition activities. During the period October to March, we will be focusing on winding down the Trust. During the period January to April, we will be spending more time and effort on setting up the new SCIO.

Also, from 1 January 2024 we are budgeting for increases in staff salaries, to reflect increases in the Living Wage, and to bring salaries more in line with market rates. This explains the increase in staff costs attributable to the transition over the period of this budget.

2. Staff building out costs - recruitment, training and deployment of facilitators for Iona, Erraid and the Park.

3. Consultancy costs - this is in two sections. The FF consultants are people who have been co-workers and have particular skills that we need, but on a much less than full time basis.

External consultants are those professionals (HR, administration, IT and accounting) to help us build our new organisation, to ensure we have the most up to date tools with which to manage our organisation. It also includes new website and marketing costs.

4. Overheads - IT costs, recruitment, support costs.

Delivering on our charitable objectives

We will be engaging with our donors, participants, alumni, resource people, friends of Findhorn across the world as we put together our new programme of workshops and events. Part of this work will be holding meditations and workshops.

Additional incremental resources will be required to support the transition process, especially professional support to ensure that what we create meets the legal requirements of today's world, is sustainable ecologically and economically, and is open to a diverse and inclusive world. Each team member will identify what is needed on an iterative basis throughout the transition period.

When we have explored the possibilities and it comes time to build the future, we will close the transition fund and open new specific funds for each of our agreed priorities so that you will always know what your contribution is supporting.

How will we use your contribution?

By contributing to the Transition Fund, you will directly support envisioning the future of the foundation. We will listen to you and spend time in attunement together.

All donations to the Transition Fund will be used to create the new - ***they will not be used to close the old.*** Examples of activities that the transition fund will support include:

1. Holding attunements and meditations
2. Focus group discussions - in person and online
3. Conducting research
4. Hiring contractors and consultants for specialist input
5. Building business plans and financial models to ensure long term sustainability
6. Staff costs associated with the work
7. Production costs of renewing our core experience programmes.

Your contributions will be spent directly and only on this work. We will provide regular updates so that you can track and review our progress as we explore what is possible.

More information

If you have further questions or would like more information, please write to Shaun.Vincent@findhorn.org.