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Tom Gallivan, MD

Dot Surveying Ltd becomes Scotland's First Employee-owned Surveying Consultancy

Dot Surveying has become the latest business to move to employee ownership. Owner Tom Gallivan was looking to find an exit option that kept the team together and allows the company to continue to grow.

Dot Surveying is a multi-disciplinary property surveying company specialising in the Telecoms sector, and also working across land acquisition and development, renewables, dispute resolution and town and country planning. The 21 employees comprise chartered surveyors, property managers, town & country planners and support staff. There are also a number of free-lance consultants who support the company's operations. The consultancy was founded in 2020 by Tom Gallivan who was the sole shareholder until the EOT was implemented. Tom has sold a majority of his stake to the EOT, retaining a

minority shareholding to demonstrate his continuing commitment to the business.

Tom says, "The business has performed so extremely well over the years, surpassing my expectations on what could be achieved in a relatively short time. This success can be attributed to the fantastic employees we have in place and it felt right that they should own the future of the company. I also have to thank our loyal clients who have supported us over the years. I believe that employee ownership will reinforce our partnership approach to doing business and allow us to continue to provide the expert service our customers are used to."

The news was embraced enthusiastically by staff at the company. Commercial Director,

(Continued)

**Trustee
Training**

25th May 2023

9.30 - 11.30

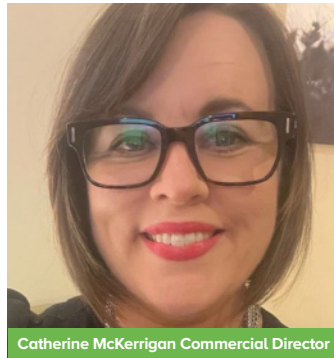
Information [here](#).

Catherine McKerrigan is delighted by the move. *“This is a generous and visionary gesture by Tom, he’s showing tremendous confidence in us, that the company will be safe in our hands.”*

Operations Director Christopher Searle says *“It’s up to us to take Dot Surveying to a new level. It’s an exciting prospect and with the fantastic team we have at Dot Surveying - I’m convinced we’ll continue to grow and flourish.”*

Henderson Loggie provided corporate finance and taxation advice to the company. Rod Mathers, Partner of Henderson Loggie says, *“The EOT was a very good fit for Dot Surveying as a business and for Tom Gallivan as the business owner. We were delighted to have led them through the EOT transaction.”*

Anderson Strathern provided legal advice. Ewan Regan, Director, has completed a large number of EOT transactions. *“We are seeing a continuing interest in EOTs as a succession option for successful businesses. Working with Dot Surveying Ltd has been a particularly rewarding transaction as this is a relatively young business moving to employee ownership to reinforce all that was already good in the company.”*



Catherine McKerrigan Commercial Director



Christopher Searly Operations Director

Specialist lender Thincats has supported a number of EOT transactions and worked with Dot Surveying Ltd on their funding requirements. Ben Kimball, Director Business Development, ThinCats says, *“It’s always a pleasure working on collaborative deals such as EOTs. All stakeholders share the same aim; to enable the business to continue to flourish in the long-term. We wish Dot Surveying well in this new chapter in their story.”*

Employees welcomed the news at meetings in the company’s offices in Edinburgh and Solihull. The news was received enthusiastically with plenty of questions being asked. The company is now launching the process to select employees to join the newly formed Trust Board.

Employee-owned Dunedin Advisory win first place on Business Gateway Fife Specialist Advisory Panel

From 1 April 2023 the **Dunedin** team are panelled within the Business Development and Finance sector of Business Gateway, where they will be supporting Fife businesses who are eligible for specialist support.

Director, Christine Convy, said: *“We are so pleased to continue our strong relationship with the Business Gateway team working alongside their designated BG advisors to deliver valuable support to the Fife business community.”*

“BG Fife provides much needed additional support across the full business spectrum and encourages business leaders to invest in business improvement and growth. The services include business start-up, resilience and growth, no matter what size or stage the business is at. There are an array of support mechanisms from webinars, face-to-face meetings and project implementation.”



“We enjoy meeting with the businesses and working alongside directors and business owners to make a difference.”



Parfett sales break £600m barrier

Employee-owned cash and carry and convenience store giant has handed its staff an “extraordinary pay rise” to help with the cost-of-living crisis.

A G Parfett & Sons, which is behind the Parfett's Cash & Carry, GoLocal and Gold brands, has awarded a 7.5% rise for salaried staff while weekly paid employees have seen an increase of 9.6% to hourly rates.

Staff are also to receive an extra day of paid holiday and can take additional unpaid holidays to a maximum allowance of 38 days for full-time staff.

The news comes as the company announced its turnover had risen by over 6% to £605m in the year to June 30, 2022.

The company has not revealed how much pre-tax profit it achieved during its latest financial year while it is overdue publishing its accounts on Companies House.

Joint managing director Guy Swindell said: “We have remained laser-focused on our customers over the last year and put in place a record number of promotions that have attracted a tremendous amount of interest.

“With the rising cost of business, retailers are having a tough time, and we are doing everything we can to help them maintain their margins.

“Everyone at Parfett's is pleased with the results for the year ended June 2022.

“It has been a year of consolidation following two record-breaking years, the business is now debt free, and has, once again, seen record

sales being achieved despite having to continue to work through supply chain difficulties.”

Joint managing director Noel Robinson added: “The Go Local symbol group continues to grow at pace and remains a vital part of our strategy. While Go Local Direct (GOLD), the Free delivery service, which launched in the Sheffield depot, has expanded to Somercotes, Aintree and Middlesbrough.

“We continue to work closely with our customers to ensure that we are easy to do business with and support them wherever possible.

“All our hard-working colleagues deserve recognition for the fantastic service they deliver throughout the year.

“Once more, our trading performance has allowed our staff to benefit through our employee ownership bonus scheme and an exceptional cost of living bonus.”

A G Parfett & Sons was founded in 1980 in Stockport. Parfett's Cash & Carry has branches in Stockport, Halifax, Somercotes, Sheffield, Middlesbrough, Birmingham and two Merseyside depots in Aintree and Anfield. The GoLocal brand has stores across **North West** Midlands and South Yorkshire.

Graeme Nuttall OBE advised on the company's move to employee ownership in 2008. He said “This is a splendid example of what good EO looks like and what lies ahead for the UK economy as the ever increasing number of EOT owned companies deliver the full benefits of #EO. A tremendous legacy for Steve Parfett & family”

OAUK News

The 2024 National Center for Employee Ownership held their national conference last week in Kansas City. This is probably the largest employee ownership event in the world. In his **keynote speech**, Executive Director Loren Rodgers said,

“The most important thing you can do to support employee ownership is to make your company great. Nothing is as powerful as a good example.” He went on to say that employee-owned companies should contribute to the larger employee-owned community and make time to tell their story.

We are very fortunate in the UK to have so many superb examples of successful employee ownership. I was lucky enough to work with Parfett's on their transition back in 2008. I think we did around 35 workshops in total across the 7 sites to inform employees about the change in ownership. Parfett's was a much loved family business; many of the staff had been with the company for a very long time and the genuine affection for the family was evident. It's now a greatly admired employee-owned business that continues to set standards on how to run a successful business in challenging times.

I had a great visit to Broughty Ferry to catch up with the employee owners of Altar Group. Financial Director Vicky Anderson came away from the recent EO Learning Journey buzzing with ideas on how to embed employee ownership in the Altar companies. One initiative is the proposal that all employees add “Co-owner” to their job title on their email signature. It's a small and subtle addition but what a powerful statement it sends out to customers and the wider network! It was a particularly well timed visit as it coincided with the company's weekly “Cake Tuesday”. There was an array of delicious home baked cakes to choose from, and I was also able to fit in a selfie with Oor Wullie in the reception – thank you Altar team!

Interesting to see HMRC is planning a consultation on the EOT legislation. It is my experience having worked on a great number of EOT transactions that business owners take this route for the right reasons; they want the business



to continue for the long term in the hands of the employees. However, it would be naïve to think that there will not be some EOT transactions driven largely by the tax exemption where the future of the employees is not the key driver. I agree with the Chartered Institute of Taxation's proposals on firming up the rules on the trustee composition. The trustees are the guardians of the company's employee ownership and a robust and appropriate trust board should ensure that employee interests are core to the business strategy and activities. Do please get in touch if you have any views.

It was a real privilege to work with Dot Surveying on their transition last month. Tom Gallivan is very definitely a business owner who chose the EOT for the right reasons. This is a tremendously successful company and Tom's desire was to find a structure that allows the employees to benefit from the future growth. The EOT delivers that and I'm looking forward to working with the company in future.

There are a few other projects just about to come into fruition – news of these companies next month. In the meantime, do keep your stories coming. As Loren Rodgers said, “tell your story”!

Yours in partnership

- Carole
01786 611066

Mediascape celebrate 5 years of employee ownership

Employee-owned audio-visual specialists, Mediascape Ltd, celebrated their 5 year EO anniversary with a party in a plush Glasgow restaurant. The firm was founded by Angus and Shona Knight with two former colleagues back in December 2003. When Angus and Shona began to think of retirement plans, they knew any sale would result in an inevitable relocation of the company's HQ and they wanted to protect the local employment as far as possible as well as maintain the company's excellent reputation for AV expertise and superb customer service. They decided to explore the employee ownership option and deciding it was a good fit, sold the majority of their shareholding to an EOT in 2018. Five years on, Shona has retired from the company and Angus remains as Executive Chairman. Mediascape has truly flourished with employee ownership.

Niall MacDonald joined the company as MD in 2020. Niall had previously held MD roles with employee-owned companies Tullis Russell and Aquascot. His appointment came at a difficult time and his first task was to navigate the company through the Covid restrictions. As Mediascape



requires access to customer premises to carry out its work, the constraints meant that the company's activities were seriously limited. Everyone pulled together and the company emerged stronger than ever with a very bright future ahead, supplying most of Scotland's universities and many private businesses as well as historic buildings with the most advanced audiovisual equipment available.

The company took the opportunity of the get together to recognise the retirement of long serving AV professional Frank McAllister who retires from the firm next month. Although Frank is looking forward to enjoying his retirement, he will be sad to leave. He said on the night *"This is the best team that Mediascape has ever had. The engineers are superb, the support side is working well and the company has a very bright future ahead."*



Frank McAllister



Angus Knight, Niall MacDonald, Shona Knight, Craig Douglas

New Trustee for Microtech

Craig Ferels has been appointed as Employee Elected Trustee on the **Microtech** Trust Board. The Kilmarnock based IT business which counts NHS Scotland among its clients became employee-owned in September 2021.

Craig is a Senior Analyst with the company. Speaking of the appointment, Craig said *'I love it here at Microtech - the people make this company a success and I'm delighted to assume the role of trustee.'*



Craig Ferels

Kilmac introduces new Safety Award

Employee-owned construction firm **Kilmac** are committed to safety performance as their first priority. To reinforce the importance the company places on excellent safety performance, Kilmac has implemented a quarterly Safety Award.

The company's Health and Safety Manager, Mike Gaffney, will make the award based on exceptional safety performance which he witnessed during his site safety audits during each quarter. The first recipients of the award are Chris Lochrane and Niall Stirton for outstanding and consistent Health and Safety measures whilst working on the various Aldi projects.



Chris Lochrane & Niall Stirton

guitarguitar duo half marathon

Well done to Iain Donald and John Buchanan of **guitarguitar** on smashing the Strathclyde half marathon recently. John Buchanan, Senior Manager with the music retailer that became employee-owned in 2022, is a veteran of marathons.

John says, *"I convinced Iain to take part in the race and what an impressive performance! From considering it to motivating himself to get the "miles" in he made the race look easy... superb."*



Iain Donald & Josh Buchanan

Congratulations Victoria Hoblyn - 20 Years at ERS

Congratulations to Vicki Hoblyn on 20 years service with employee-owned **ERS**. The firm is a specialist site investigation and environmental remediation contractor based in Scotland, and cover the entire UK from their Glasgow HQ. The company has 35 employee-owners with a wide range of expertise, all focused on the investigation and remediation of contaminated soil and groundwater

Vicki joined ERS as an Environmental Science graduate in 2003, working in the Glasgow and Inverness offices and is now based in the Channel Islands.

Over the last 20 years Vicki has grown to become a key member of ERS, managing numerous contaminated land projects from gas works to paper mills and shipyards. This has facilitated developments such as a Scottish Premier League football stadium, an Energy Centre for a Scottish University, and a mixed development on the River Clyde.



Vicki's been a great source of support and advice to colleagues who look forward to working with her for the next 20 years.

Changes to EOT legislation in the pipeline?

As part of a recent webinar programme, Graeme Nuttall OBE emphasised that the Employee Ownership Trust legislation should not be considered a tax scheme; it is a different way of doing business. HMRC is now looking for input on how to strengthen the legislation to ensure it is used for bona fide purposes. The Chartered Institute of Taxation has already submitted proposals to regulate who can be trustees of an EOT.

As part of a programme to simplify and modernise the tax system, tackle non-compliance, make the tax system fairer for taxpayers and to make the customs system work better for traders. Specifically, the government will publish a consultation later this year on the use and effectiveness of the Employee Ownership Trust tax regime, to ensure that the reliefs are targeted closely at incentivising EOTs as an employee

ownership business model whilst preventing the reliefs from being used for unintended tax planning. Interested parties are invited to submit their views and recommendations.

The EOT has proved to be an extremely effective model for implementing employee ownership in the UK, and the superb growth in the number of employee-owned companies is evidence of that. Indeed, the UK's EOT structure is being replicated in other countries. The challenge will be to ensure that the structure is used only for businesses committed to true employee ownership, yet retains the flexibility to suit the different circumstances and aspirations of each business.

OAUk will be making a submission and welcomes views and ideas from the employee-owned community and advisers. You can see HMRC's call for evidence [here](#).

Executive selection boss finalist for Entrepreneur of the Year

Founder and CEO of **Livingston James Group**, which became employee-owned earlier this year, **Jamie Livingston** has been selected as a Scotland finalist for EY Entrepreneur Of The Year™ 2023 UK. The company specialises in the attraction and selection of board and head of function level talent in the areas of Professional Services, Private Equity and CFO Services.

This award recognises individuals from across the UK who are leading successful businesses with purpose, vision and entrepreneurial spirit. The company believes that Jamie excels in ensuring the firm's purpose and values remain at the forefront of business



Jamie Livingston

activities, and are delighted he is receiving this well-deserved recognition for his efforts!

This EY programme was established more than 30 years ago and today operates in more than 60 countries and 145 cities around the world.

Finalists announced for WeDO Scotland EO Business of the Year Awards

Huge congratulations to **Grossart Associates** and STAR-Dundee who have been announced as finalists in the category for Employee-Owned Business of the Year Awards. The winner will be announced at the Awards Dinner in Edinburgh on 18th May.

Grossart Associates is based in East Kilbride and began in 1985. The structural engineering firm has experienced significant growth – in turnover, profit and employee numbers - since becoming employee-owned in 2019.



Started in 2002, **STAR-Dundee** was born out of the Space Technology Centre at the University of Dundee, which led the technical work on the SpaceWire standard, something which staff at STAR-Dundee have been instrumental in for more than 15 years. The company became employee-owned in 2017.



GROSSART ASSOCIATES
CONSULTING CIVIL AND STRUCTURAL ENGINEERS



STAR-Dundee

Clansman Dynamics seeks independent trustee

Award-winning engineering firm, **Clansman Dynamics**, is looking for an independent trustee to join their trust board. The firm has been employee-owned since 2009 and designs and manufactures manipulators from its base in East Kilbride. The vast majority of the company's production is exported across the globe.

Clansman Dynamics is viewed as a phenomenal success story of employee ownership. The company started in 1994 when Dick Philbrick and his two co-founders started the business to address a gap in the market for quality handling equipment for the forge and foundry sectors. When Dick began to think about succession, he wanted to find a solution that allowed the company to remain in Scotland and continue to do what it does so well, hence the move to employee ownership.

The role of the trust is to ensure the company continues to flourish by holding the board to account for creating a commercially successful business that is a great place to work.



CLANSMAN DYNAMICS 

The trust meets quarterly in the EK headquarters. The ideal trustee will be familiar with the employee ownership model, understand the importance of the role in the employee-owned company, and have a sound knowledge of corporate governance. Experience in manufacturing would be an advantage.

Enquiries in the first instance to Chair of the Board of Trustees, Dick Philbrick, at dickphilbrick50@gmail.com

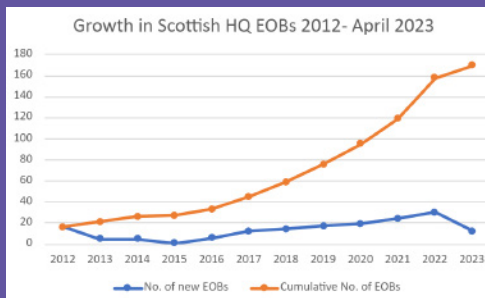
Kenny Mennie joins the YES Hire Team!

Falkirk based **YES Hire** continues to grow with the addition of a new Business Development Manager. The company has opened a Dundee location in the past few months and has experienced significant success since their move to employee ownership in October 2022.

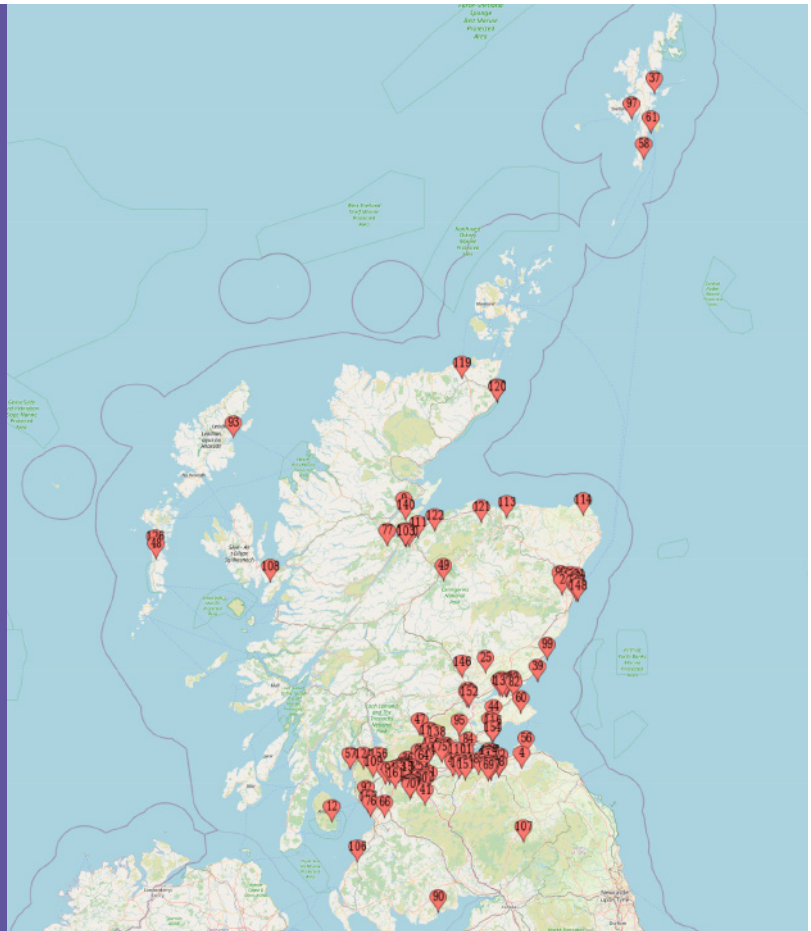
Managing Director, David Johnstone says, "We are absolutely delighted to share the news that Kenny Mennie will be joining the YES Hire Team as Business Development Manager. Kenny has a wealth of experience and is very well known within the Scottish Hire Industry and we look forward to working with him to continue to increase our market share in Scotland."



Employee Ownership in Scotland



OA Ownership Associates UK
let's make it happen



Trustee Training - 25th May 2023

This two hour session aims to equip Trustees to fulfil what is a pivotal role within the employee-owned company. The session is in two parts and is delivered over Zoom. You can join for both parts, or if you have already attended Part 1 or a previous session, you're very welcome to join only for Part 2.

Part 1: Information giving – legal duties of trustee, responsibilities, the Trust deed, the Trustee role. 9.30am – 10.30

Part 2: Case Study – group work on a trustee dilemma in an employee-owned company. All groups work on same case study, come together to report on discussions. Everyone says this is tremendously useful. 10.30 - 11.30

To register your interest email carole@ownershipassociates.co.uk