Save The Forester
Public Meeting October 31st 2026
Q and As

Shares and Investment terms

Q. Are investments eligible for tax relief?

A. At this stage you are advised to make your investment under the assumption that tax relief will not be available

Q. What happens to my shares if I die?

A. Your shares are included in your estate like any other assets, allowing your executor to manage them in the same way. The Co-operative and Community Benefit Societies Act 2014, nomination rights apply only to the first £5,000 of a member's property in the society. Any excess amount cannot be passed via the society nomination. Instead, it must be handled through the normal administration of your estate (via probate or letters of administration) and distributed according to your will or the rules of intestacy

Q. Will I get my investment back if The Forester fails?

A. If the business fails, all assets—including the building—are sold. Creditors are paid first, and remaining funds are split among shareholders based on their holdings. You may get back some, all, or none of your investment, depending on the property's value at failure. CBS rules ensure you cannot receive more than you invested.

Q. Will investors enjoy discount at the bar or any benefits

By very definition a CBS cannot favour members (shareholders) because it is a Community Benefit Society and is run for the benefit of the community, not its members.

The Tenancy

Q. Do we have a role description and person spec for the tenant?

A. No, not yet. We are currently working on this and expect to have it available shortly. We will provide it to anyone who might know someone to forward on to and we will also put it on the website

Q. Pubs are having a tough time at the moment so what can we do to give the tenant the best chance to succeed?

A . The CBS model allows us to offer an affordable rent to the tenant. As the community are investors in the pub, they are vested in making it a success and will help attract custom

The Business Plan

Q. Does the BP and SO talk about how many covers, volumes, pricing etc to succeed?

A. To a degree. It is clear the current owners carried many costs a tenant will not - £70k Head Office, c.£30k labour, some depreciation, so we believe it can succeed, especially given that the previous owners Chris and Lizzie were very successful. We are fortunate that we have had access to the books for the last 2 years of trading for the pub, so we have an accurate estimate of basic levels of trade. As both of these documents will have the **Community Shares Standard Mark (CCSM),** we can be confident that they meet strict guidelines of transparency, fairness, and governance. The certification process requires an independent, rigorous assessment of the business plan, share offer document, and governing rules by a licensed practitioner.

Q. Who is responsible for repairs and could any latent problems with the building fall on the responsibility of the CBS?

A. We will have a full structural survey as well as buildings insurance which will provide cover against any structural problems with the building. Under the terms of an FRI lease the tenant is responsible for all repairs (unless the lease specifically reserves responsibility for something to the landlord).

Q. When will Share Offer and Business Plan be circulated?

A. Mid/late November after a) financial forecasts have been finalised and b) we have achieved CSSM accreditation

Community Impact Objectives of the Pub

Q. You haven't said anything about the community objectives of the pub

A. This is a vitally important aspect of the initiative and has been thoroughly documented in our grant applications. The pub will represent the only shared public space in the village of Donhead St Andrew and we expect it to be used for a wide range of activities according to demand (eg quiz nights, club meetings, an affordable lunch club, yoga, talks, pilates, games clubs etc). We are likely to follow the example of other community owned pubs and provide the space free of charge, in order to encourage footfall and keep the pub at the heart of village life. We expect to involve volunteers in arranging activities and to provide volunteer led transport to enable those who need it to participate. The details are covered in the BP and SO documents in the Community Impact Statement