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THE WHITE HORSE INN, OVERTON

Viability Report



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Applicant Name and Address

Applicant name:	Joule's Brewery
Applicant address:	Joule's Brewery, Great Hales Street, Market Drayton, TF9 1JP

Site Address Details

Site address:	The White Horse Inn, 21 High Street, Overton, Wrexham, LL13 0DT

Executive Summary

This viability report is submitted in support of the planning application for the conversion of the White Horse Inn in Overton into six residential apartments. The report provides evidence demonstrating that the building is no longer economically viable as a public house. This evidence includes business meeting notes and email correspondence between Joule's Brewery and the tenants of the White Horse Inn, and between Steve Nuttall and interested community groups.

The submitted documentation highlights the commercial challenges faced by the property and underscores the need for its repurposing in response to both the building's financial difficulties and the broader local economic context. It also includes a marketing report from Matt Phillips of Matthew Phillips Surveyors which states that there has been negligible interest in the purchase of the building as a pub business.

Site and Surroundings

The White Horse Inn is located on the historic “High Street” in the centre of Overton village. The High Street is made up of a large collection of 18th and 19th century buildings and the White Horse forms part of an important part of this run of Listed Buildings.

Historically, the High Street was lined with a mixture of shops, public houses and smaller cottages and terraces. Many of the terraces have now been altered and converted into single dwellings and there is also evidence of infill housing development. Thus, the site is now adjoined by residential units on all sides, and there is a small number of commercial units in the locality.

The Cheshire/Welsh border is close by, and Wrexham is 7 miles to the north. Bangor-on-Dee, Penley, Ellesmere and Ruabon also provide a well populated catchment. The village has developed alongside the key routes of the A539 Wrexham to Whitchurch Road and the A528 Marchwiel to Ellesmere.

Overton is a popular area and each property on the market receives a high volume of enquiries. Wrexham was named the busiest rental market of 2023, with landlords in the area typically receiving 56 enquiries per property. Nationally, there is a shortage of properties in Wales for purchase or rent at affordable prices.

White Horse Overton, Location Plan



0 50
Metres

ReQuestaPlan

Plan Produced for: Joules Brewery

Date Produced: 05 Apr 2024

Plan Reference Number: TQRQM24096125551337

Scale: 1:1250 @ A4

The current White Horse was built by brewer Soames in 1898, re-emerging from the original White Horse, which was built over 400 years earlier and suffered a fire. It was re-built as a Victorian coaching inn in mock-Tudor style designed with various snugs and parlours and with a bar for the village workers who served the nearby estate Bryn y Pys.

A Grade II Listed Building, the pub is of special architectural, historic and heritage interest and a good three-storey example of an earlier C20 neo-vernacular building, showing the use of a distinctive architectural style for a commercial building. The building is an example of the Black-and-white Revival which was amid 19th-century architectural movement that revived historical vernacular elements with timber framing.



Ruabon brick with stone dressings to lower storey, mock timber framing above, in quatrefoil panels to first floor, and sunk quatrefoil panels to strongly jettied upper storey, the jetty carried on heavy brackets. Red plain tiled roof. Three-storeyed, wide 2-window range dominated by 2 gables and service wing to rear, with hipped roofs stepped down in height from the main range. Arched entrance to courtyard to left, with main entrance to public house alongside. Two paired mullioned and transomed windows to main bar. Bowed oriel windows in upper storey with leaded lights, and 6-light mullioned windows with leaded lights beneath gables in upper storey. Brick and terracotta end-wall stacks – Source: Historic Wales.

The property is currently in use as a public house, remodelled by Joule's from 2008-2009 with much of the internal works visually identifiable. On the ground floor there is main bar and dining area at the rear plus a commercial kitchen and courtyard garden. To the 1st floor there is a function room, for circa 75 people, and a manager's flat to the top floor.

Joule's Tenure

In 2007, Enterprise Inns advertised the pub for sale. The pub was in very poor condition and trading as a downmarket boozer and consequently had had several complaints lodged by locals. Enterprise Inns concluded that it did not warrant investment.

Our analysis at that time was that this was the wrong offer for an affluent village, and, with investment, an opportunity existed to create a more attractive offer for the local market. Our analysis concluded that this would have to include food, and we believed that a traditional upmarket, refurbishment would provide us with a good business.

Our business model is to run pubs in partnership with franchisees, and we believed that this offer, done to a high standard, would attract franchisees to partner with us.

We purchased the pub for £350,000, which we felt was an attractive price at that time.

Plans were lodged in 2008 and 2009 [p/2008/1093 and p/2009/0393].

The plans brought into use the rear outbuildings to create additional dining space and a commercial kitchen. The plan was to operate a local's bar to the front, with the rear of the property dedicated to dining, which we hoped would attract both local trade and some destination trade.

Particular attention was paid to restore the original layout of the building. We found the original plans of the construction [now on display in the white horse] and we re-introduced partitioning in an authentic style using stained glass and reclaimed glasswork.

The pub opened in 2009 and was well-received, winning a national design award for best pub refurbishment. This was a very significant accolade for our young business.

The total investment was £250,000.

(Steve Nuttall, Managing Director – Joule's Brewery)

Trading 2009 – 2015: Viable but Underperforming

Our initial franchisees Steve and Jane Dodwell traded the pub with a bias towards food. Their assessment was that the pub should be food lead. They were dedicated and talented, identified as upper quartile operators by Joule's. Under their tenure the pub was viable but failed to deliver the returns which we had forecast as trading was at the low end of our expectations. We worked with Steve and Jane to help them to build better bar trade to complement the food offer.

The challenge in building this side of the trade is evidenced by business notes which refer to the club in the village enjoying local beer trade **(See Appendix A1, p.16).** The club is a community facility operated by volunteers and has a premises which is subsidised by the Council. Prices are low and the notes refer to an inability for the White Horse to compete on price which meant Steve focussed on the food offer.

Notes also refer to the strong competition from a Brunning and Price pub, a large well know brand which is under a mile away **(Appendix A3, p.20).**

Over this period the pub was marginal for both Joule's, as the freeholder, and for Steve and Jane as our franchisees. Steve was a trained chef so ran the kitchen and Jane managed the front of house. As a team they were very efficient so were able to convert some of the turnover to profit. The business was marginal for them, a lifestyle business.

Trade was £4.5-5k per week, and I would estimate their earnings as being modest, around £30k per annum, with the addition of savings made from living on site. The Brewery categorised the pub as an underperforming asset and our initiatives focussed on increasing sales and improving beer sales.

In 2015, Steve and Jane served their notice citing that the pub was not attractive enough commercially to justify their continued efforts. Joule's hoped the change would give the pub a fresh start and the goal was to recruit an 'all-rounder' operator who could maximise both the food offer and also improve bar sales.

(Steve Nuttall, Managing Director – Joule's Brewery)

2015 – 2024: Unviable Inability to Secure Long-Term Franchisees

Over the past nine years we have had six operators; in each case they found the pub unviable:

Operator	**Tenancy Period**
K Ogden	July 2015 – January 2017
M Antoszkiewicz	January 2017 – November 2017
Managed – Stuart	November 2017 – January 2018
D Edwards	February 2018 – May 2020
K Jones	August 2020 – January 2023
M Burton	June 2023 – January 2024

The Brewery offered reducing rents, subsided beer and tried to support the operators and provide time for them to build an offer. Various issues were quoted and are raised in the business notes **(Appendices A-C, p.16-71).**

By 2020 we concluded that the pub was not viable for us for the following key reasons:

Primary: *Insufficient food trade: Even with specialist food operators the pub is not able to secure enough food trade to cover the costs of employment to service such an offer. Even when the franchisee was a food specialist. The common factors for this are that the village is small so we lack the day to day trade, Operators also stated that pub does not have the street appeal of a destination 'country pub' it has the street appeal of a local pub. Customers do not see it as a food house. The dominant presence of a pub restaurant less than a mile supported by a strong brand with a food reputation has meant that our operations have not been able to complete with that offer.*

Secondary: *Over the period we have had operators who have tried to operate the pub as a beer lead pub, supported by a low key – budget food offer. Business notes refer to efforts to offer live music, quiz, darts, and at one stage TV's. Notes refer to the difficulty in completing on price with the village club, but also that's the customers who used the club were settled there, there was a rhythm with that. The pub, when it was bar focussed failed to attract trade from nearby villages, so relied largely on the village which was not sufficient for a viable business. Operators also claimed that the club held an unfair advantage, on price, as it was not for profit and subsidised and that it held the core of the local trade, in turn people attract people and this was a key factor hampering efforts to build a bar trade. Lastly, operators have stated that the village is upmarket, and pub going is low frequency.*

A summary of the operators is detailed in **Appendices A-C (p.16-71).** The schedule also shows the **profits and losses** for Joule's Brewery **(Appendix D, p.72).**

While we do not know the profits and losses for the individual operators, we believe that at best the pub offered a marginal living with many reporting losses.

(Steve Nuttall, Managing Director – Joule's Brewery)

Joule's Exit Plan and Conclusion

Despite our and our franchisees' best efforts, and having tried multiple approaches over a sustained period, we concluded in 2020 that the pub is not viable commercially.

There is not enough demand for a bar-orientated pub, equally there is not enough demand for either a gastro food-led pub, or a regular food-led pub, but it is necessary for the pub to do both to generate enough trade to be viable.

The point of final closure has come about as the business has been marginal for our whole tenure years, as is the case with many other small village pubs. Economic pressures, such as the increase in the fixed costs of opening to utilities, means that the pub became loss-making. It is simply not viable to heat and light nor to operate a modest food offer with all the associated costs.

Even prior to the increase in overheads, we had been struggling to operate the pub. With these increases, along with staff costs and lower sales, the pub is nowhere near feasible. This is true of many borderline pub businesses which is why so many have closed in the last two years.

(Steve Nuttall, Managing Director – Joule's Brewery)

Joule's Brewery Motivation

In support of this analysis and in seeking agreement for a change of use, it is important to raise the issue of motivation of the freeholder. In our case we have demonstrated a long-term commitment to making this work, we and have had a sustained and focused effort. This is evidenced via our correspondence and business meeting minutes with all of the pub's tenants **(Appendices A-C).**

It is now clear to us that we cannot sell this pub as a pub, for the reasons outlined above. We are now also no longer able to operate it.

Joule's is a pub operator with 43 pubs; we of course wanted the pub to work as a business and we are not property developers looking to enhance the value of the assets. Our motivation is to exit the business as we cannot both find an operator to run the pub, even on a rent-free basis. We have offered flexible terms and finance, to secure a buyer which is outlined on the marketing report attached **(Appendix E, p.73).**

Supporting information is included below. These show the profitability [losses] incurred over the last 5 years **(Appendix D, p.72).** The notes also include a selection of business notes and correspondence which evidence some of the issues which we have faced from franchisees over the last 5 years **(Appendices A-C)**.

(Steve Nuttall, Managing Director – Joule's Brewery)

Market History Overview

Matthew Phillips MRICS, of Matthew Phillips Surveyors provides a summary of the marketing campaign **(in full Appendix E, p.73**) for the White Horse at Overton below:

Matthew Phillips Surveyors
Licensed | Leisure | Commercial Property

Mr. S. Nuttall,
Joules Brewery
c/o Red Lion
Great Hales Street
Market Drayton
Shropshire
TF9 1JP

23rd January 2025

Dear Steve,

White Horse, Overton – Marketing Summary Report

I write to provide a summary of the marketing campaign and initiatives undertaken for the White Horse at Overton.

The White Horse lies in the centre of Overton (population circa 1300 Census 2011), close to the Cheshire/ Welsh border and adjacent to the River Dee. Wrexham is 7 miles to the north. Bangor-on-Dee, Penley, Ellesmere and Ruabon are all closeby. The Village comprises a range of mainly privately owned housing, local shops and includes Overton Recreational Club, which houses a number of community groups and events. In addition, the village is also served by two other public houses, namely the Cross Keys at Overton Bridge and the Boat at Erbistock, both of which are within 1 mile.

The public house is an imposing and highly attractive property of 3 storey Ruabon red brick construction beneath pitched red plain tiled hipped roofs with mullion windows and leaded lights. An archway provides access to the courtyard beer patio to the rear of the site. The property has been well refurbished to accentuate the many attractive original features both internally and externally. Indeed, I am aware that The White Horse was refurbished by Joules in 2009 and won the prestigious national design award for best refurbishment; an award made by the Campaign for Real Ale. The public house is a Grade II listed building and lies within a Conservation Area.

There are 2 trading rooms on the ground floor with a function facility/meeting room on the first floor and generous living accommodation. A large beer patio is to the side and rear.

I am aware that despite the attractive nature of and the significant investment in the property, trade has over many years been disappointing. Trade is exclusively evening based as a result of the lack of day time footfall in the village and due to the lack of parking. Both The Cross Keys and The Boat – see above – provide strong local competition; both of which are in more attractive locations with requisite parking and appropriate facilities to promote strong food offers.

Continued.....

The above trading difficulties, coupled with the lag from COVID, increased energy and wage costs, and the effect of the cost of living crisis on customer disposal income, has resulted in the site becoming unviable.

Therefore, Joules made the decision to dispose of the site. Instructions were first received from Joules in March 2022 to offer the property for sale on a low key basis to known acquisitive parties off an asking price of £425,000, subject to contract.

It was not possible to generate interest by way of a low key marketing campaign and as a result instructions were received from Joules to fully market the property during the early part of September 2022 with the same asking price. As part of the marketing campaign Joules offered to provide funding to support freehold offers.

A sale board was erected, and the property was uploaded to MPS website and the third-party websites we subscribe to namely Rightmove, Daltons, Businesses For Sale and Estates Gazette Property link. Full mailshots were also carried out from the database. In addition, contact was made with the local press, The Leader, which featured an article of the proposed sale of the property.

In addition, a 3 D Tour using Matterport technology was commissioned and used as part of the marketing exercise. See link -
https://my.matterport.com/show/?ref=em&m=b8u6wi5715M&gt=1&ts=1&help=1

Unfortunately, the marketing campaign generated very little interest and the price was reduced to £374,999 as at the 20 April 2023.

Thereafter, throughout 2023 and 2024, the marketing campaign has been progressed to emphasize the flexible attitude of Joules in providing funding to interested parties and the site has been offered on a For Sale/ To Let basis on flexible lease terms, in an attempt to generate interest from the widest possible market. Mail shots have been undertaken from MPS database and the property has remained on MPS and the 3rd party websites.

Interest in the property as a public house has been very limited. In total 6 viewings have been undertaken. The last of which was in December 2024. There has been very limited positive feedback from parties who have viewed. The majority have questioned the viability of the site as a public house following viewings. No formal offers have been forthcoming although a proposal was received from a developer which required Joules to partially fund proposed development works to provide a community café/wine bar to the ground floor and flats above. This offer was declined.

In addition, individuals who represent the community inspected the site in February 2023 with a view to coming forward with an offer on behalf of the community. Despite ongoing irregular contact, the community have not come forward to firm up interest.

In summary therefore, the property has been formally marketed over the course of the last nearly 3 years with a sale board in situ. The site has been fully exposed to the market but interest in the site has been negligible.

Please let me know if I can provide any further information you require.

M.C. Phillips MRICS

Community Engagement

Joule's notes Policy R7 of the Wrexham Local Plan, which pertains to the loss of a community facility, and appreciates that finding a public house as not commercially viable is not always reason enough to grant planning permission for conversion. Joule's acknowledges that community life is likely an essential aspect of Overton's character and that the pub will hold significant cultural and historical value for the local community. When a community facility is faced with closure it is important to respect a community's interests and values via transparent consultation.

Individuals who represent the community inspected the site in February 2023. Despite ongoing, irregular contact, they did not come forward to firm up interest. This line of communication reopened in February 2024; Steve Nuttall met with the group in February 2024 to discuss a community re-launch of the White Horse, of which the discussion is summarised in **Appendix F.**

Talks have progressed and **Joule's now offers the group one of two options with the purchase of the freehold: a community not for profit venture; or a community company and a share placement locally**. Please find this offer in full in **Appendix G.**

Appendices

Appendix A – A selection of business meeting notes (Joule's Brewery with operators Donna and Andy) dated from August 2019 – March 2020

Appendix A1 - business meeting notes from 22nd August 2019
Appendix A2 - business meeting notes from 6th September 2019
Appendix A3 – business meeting notes from 18th October 2019
Appendix A4 – business meeting notes from 17th January 2020, resignation of tenancy discussed
Appendix A5 - business meeting notes from 7th February 2020
Appendix A6 – business meeting notes from 6th March 2020

Appendix B – A selection of business meeting notes and email correspondence between Joule's Brewery and operators Kathy and Jim, dated from August 2020 – January 2023

Appendix B1 – Business meeting notes, 21st August 2020
Appendix B2 – Business meeting notes, 4th September 2020
Appendix B3 – Business meeting notes, 8th October 2020
Appendix B4 – Business meeting notes, 10th November 2020
Appendix B5 – Email from Commercial Director to Kathy, dated 16th June 2021
Appendix B6 – Business meeting notes, 12th November 2021
Appendix B7 – Email from Commercial Director to Kathy, dated 18th November 2021
Appendix B8 – Email exchange between Commercial Director and Kathy, dated 7th and 9th December 2021
Appendix B9 – Email exchange between Commercial Director and Kathy, dated 23rd December 2021
Appendix B10 – Email from Kathy to Commercial Director – proposed payment plan, dated 13th April 2022
Appendix B11 – Outstanding costs owing to Joule's Brewery
Appendix B12 – Business meeting notes, 15th July 2022
Appendix B13 – Business meeting notes, 19th August 2025
Appendix B14 - Resignation email from Kathy to Brand Operations Manager, dated 5th September 2022
Appendix B15 - Email exchange between Brand Operations Manager and Kathy, dated 6th September 2022
Appendix B17 - Email from Brand Operations Manager to Kathy, dated 27th Sept 2022
Appendix B18 - Email from Kathy to Brand Operations Manager – repayment proposals, dated 27th September 2022
Appendix B19 - Email from Brand Operations Manager to Kathy re repayment proposals, dated 30th September 2022
Appendix B20 - Email from Kathy to Brand Operations Manager, dated 4th December 2022
Appendix B21 – Email from Brand Operations Manager to Kathy re notice period and exit planner, dated 5th December 2022
Appendix B22 - Email from Brand Operations Manager to Kathy re handover, dated 12th January 2023

Appendix C – A selection of business meeting notes, financial assistance and email correspondence between Joule's Brewery and operator Mick, May 2023 – January 2024

Appendix C1 – email from Brand Operations Manager to Mick re new tenancy
Appendix C2 – business meeting notes from 26th July 2023
Appendix C3 – business meeting notes from 31st August 2023
Appendix C4 – business meeting notes from 10th October 2023
Appendix C5 - business meeting notes from 29th November 2023
Appendix C6 – screenshots of bank transfers to show additional financial assistance from Joule's Brewery to operator
Appendix C7 – business meeting notes from 24th January 2024
Appendix C8 – email from Mick informing Joule's Brewery of his tenancy notice for the White Horse Inn

Appendix D – Joule's Brewery profits and losses account summary for the White Horse Inn at Overton, from 2019 – 2023

Appendix E – White Horse Inn Marketing and Sales Details, Matthew Phillips Surveyors

Appendix F – Email from Steve Nuttall, Managing Director – Joule's to Catrin, community group spokesperson, summarising their discussion during a meeting in February 2024, dated 21st February 2024

Appendix G – Follow-up email from Steve Nuttall, Managing Director – Joule's to Catrin, community group spokesperson, dated 26th February 2024.

Appendix H – Offer of freehold email from Steve Nuttall, Managing Director – Joule's to Catrin, community group spokesperson, dated 26th March 2024.

Appendix A – Donna and Andy – February 2018 – May 2020

Appendix A1 – Business meeting notes, 22nd August 2019

Tap house Business Meeting Notes

TAP – White Horse	August 22nd 2019
GENERAL NOTES John visited to complete a review of the business with Andy following discussions over the past week. Andy shared all of the current data for John to build a financial model. The attached spreadsheet highlights the borderline aspects of the business. John to assess in more detail and look at potential proposals. Andy is keen to understand the option to become partners in the operation. John does not have a figure yet and discussions were had about the type of offer. Andy is in favour of a joint opportunity with Joule's so both retain an interest in the business. Sales have been tough over the summer as customers either go on holiday or go to the sites that have waterside aspects. John to look at marketing options.	Actions JA to send over model financials JA to speak to Matt Phillips about the value and any proposed deal for the tap
BEER BRANDS & BAR SERVERY The bar is well presented , all products are in place and the pub is still in year on year growth Andy would like to tender for the bar at the village hall, John to speak to Vicky about Coors becoming involved Andy has written back to the EHO reference the recent report and remedial works completed. He has had no response as of yet	Actions JA/ VC to look at opportunities for the bar at the village hall
MARKETING	Actions
John believes the market to approach will be the out of town food market. A lot of discussion was had around where to focus. The biggest opportunities appear to be lunch time and evenings and the use of the function room. Utilising the photos on face book The village hall is the hub of the village with a lot of the social being there. Andy to get some contact for John to open discussions	JA/PM to look at boosts on face book to drive non Overton traffic. The marketplace is there but needed AM to pass contacts to John for sponsorships at the village hall, WI etc… Molson Coors will look at bar installs if the deal is correct
TOP TAP	ACTIONS

The chalk boards are the only time outstanding on the top tap checklist, the pub is exceptionally well presented	Chalkboards to be completed and possibly varnished for fixed messaging
PROPERTY	ACTIONS
The property works have been completed Tony is starting the division for the kitchen to satisfy the EHO reports	
FOOD OFFER	ACTIONS
Food is still the key to the operation. Andy is looking at Xmas menu's now and growing this trade through marketing	JA/PM to look at boosting
NEXT MEETING	

Appendix A2 - Business meeting notes, 6th September 2019

Taphouse Business Meeting Notes

TAP – White Horse Overton	6 Sept 2019
GENERAL NOTES John visited to for a review with Andy following his holiday, a recent visit from the fire officer and to discuss the outline agreement for selling The fire officer will return so one of Andy's customers – John – has been working on all the items on site. John has cleaned the fire alarm and walked the site. He thinks that there is a need for some extra break glass and smoking area sign. John to organise He will test the system and lights with Andy, the key was found in the books. Zoning may be an issue. John to ask Hal John ran through the outline for purchasing the business. It has been valued at £425k but a price of £375K would be the offer. This would be a 3-year option deal where Andy could purchase or talk to Joule's about a mortgage with a deposit.	Actions JA to source new breakglasses and smoking area sign Fire alarm zoning to be investigated JA to complete the offer letter AM to get upto date with testing and recording for fire brigade
Trade Trade has been tough as discussed at the previous meeting. John agreed to reduce the rent for Sept – Nov to ease cash flow. This will begin for the next billing period The kitchen is the main area to lift, beer volume is very strong and the last two month and YTD all in growth. John ran through the early fixtures for the world cup. John thinks that the TENS are about £20 each so worth double checking before completing and also pre selling tickets to get customers in. If they have paid you can not lose out but if it's a horrible morning they may stay at home	AM to organise TENs for the games he is going to show
BEER BRANDS & BAR SERVERY	Actions

MARKETING	Actions
John is keen to complete the marketing plan for Andy. Photos of food need to boost the awareness . Andy to send over photo's	Andy to send John some photo's for boosting on social media
TOP TAP	ACTIONS
Chalkboards are the opportunity. JA to think up solutions – permanent?	
PROPERTY	ACTIONS
Tony has completed the boxed in area to the kitchen to help with EHO.	
FOOD OFFER	ACTIONS
Andy is looking at discounted offers to drive trade into the food. He is confident with margins and as the only chef he can manage his costs Andy is finishing his Christmas menu, Pip will process once she has it	AM to send over Xmas menu for design and print
NEXT MEETING	

Appendix A3 - Business meeting notes, 18th October 2019

Tap house Business Meeting Notes

TAP White Horse Overton	October 18th 2019
GENERAL NOTES John visited Andy for a review meeting and follow up. Andy explained that it has been tough for the last couple of months with the time of year and new competition. The Boat is open but is charging extortionately for beer - £5+ per pint. Andy is also waiting for EHO to return, he has called them a couple of times and is ready for them to return. The kitchen is spotless and Andy is confident he is on top of all of the paperwork. Andy would like to be considered for other sites. He does not want to leave the White Horse but feels that the Swan or Fox and Hounds could be a better fit for him. John briefly outlined the opportunities there with the Swan when on line being a big deal, the fox and hounds lower. Andy would be keen to look at the Swan as long as he got support from Joule's. John is happy to go through it and discuss it, costs may be tough there but Andy has more than proven himself to Joule's over the past two years. John will send details over and this can be discussed. The Swan is likely to be trading for Easter if all is well. Volume is still in growth for the White Horse at 2.2% for the year but the trend over the last three months is in decline which is supported with the rental concession. Andy is confident that Xmas will be very strong and there was a busy weekend last weekend. This was the first paid boost for the food so it could be linked, more will follow. This weekend is busy with Rugby both mornings, football and a big christening. Andy is looking forward to it. JA spoke to Andy about doing a kitchen takeover in the Red Lion. Andy is keen , maybe thinking an a la carte menu	JA to send over details for the Swan JA to look at dates for a kitchen takeover at the Red Lion
BEER BRANDS & BAR SERVERY	Actions
MARKETING	Actions
The paid boosts are now in place. More can be done with photographs The Xmas menus have not arrived. JA sent the pdf across in call so it could be put on facebook while the hard copies come	JA to send menu over JA to chase prinited menus

Facebook is being used well to promote different events within the White Horse	
TOP TAP	ACTIONS
PROPERTY	ACTIONS
Tony needs to return to complete the works and fill the hole in the kitchen	Tony Williams to return
FOOD OFFER	ACTIONS
NEXT MEETING	

Appendix A4 - Business meeting notes, 17th January 2020

Taphouse Business Meeting Notes

TAP – White Horse, Overton	17 Jan 2020
GENERAL NOTES John visited Andy following Christmas and his decision to hand notice in on the White Horse. He has decided that it is the best thing to do for his family. He would like to go on the 22nd March. John thinks that the notice is 4 months and will have to check , he will always try to work to an earlier date. Andy said that Steph gave him 3 months and he is sure of it. John will check the paperwork. John ran through the exit process and payments and monies An inventory will need to be done and then the inventory can be sold on, the remaining debt sold paid to Joule's and the rest of the money kept. The deposit will be released subject to a clean exit and any stock at handover will be a transaction between ingoer and outgoer. John advises that no stock is purchased / sold if open. Andy will get more money retailing it. Andy will not be attending the awards evening, John is disappointed Andy has spoken to Ian and Sam , John to follow up.	Actions
Trade Trade was good over Xmas and £4k last week. John confirmed that year on year was down so retro was not achieved this year	
BEER BRANDS & BAR SERVERY	Actions
MARKETING	Actions
TOP TAP	ACTIONS
PROPERTY	ACTIONS
FOOD OFFER	ACTIONS
NEXT MEETING	

Appendix A5 –Business meeting notes, 7th February 2020

Tap house Business Meeting Notes

TAP White Horse, Overton	7th February 2020

GENERAL NOTES John visited Andy as part of the exit process. Andy had left John a message about his DD as it had bounced due to all the payments being called for at the same time . Rates, Sky etc... Andy has paid £1000 and will pay the rest on Monday It was agreed that the change could happen on the 1st April 2020. John ran through the process. A property inspection will be carried out with a month to go to highlight anything that needs to be put right. Andy should sell the pool table and disco lights as these would not be bought in the inventory. There is an interested party who could potentially want them but it is very early days with them Sales have been tough for Andy, he is getting support from some people booking events before he goes but the general trade is very difficult	Andy to pay remainder of DD next week JA to advise potential franchisee's of the pool table and disco lights JA to advise of recruitment updates
BEER BRANDS & BAR SERVERY	Actions
MARKETING	Actions
TOP TAP	ACTIONS
PROPERTY	ACTIONS
FOOD OFFER	ACTIONS
NEXT MEETING	

Appendix A6 - Business meeting notes, 6th March 2020

Taphouse Business Meeting Notes

TAP – White Horse, Overton	Date: 6 March 2020
GENERAL NOTES John visited for a site walk around as the exit is within the next month Andy has started to empty the pub and tidy up. He explained that he will leave it clean and tidy, cleaning out all of the kitchen also so it is ready to go. Andy asked about plates and alike that Joule's may not want. Andy Leach has not contacted John back so John advised that Andy should sell everything privately to achieve best price. Andy will have his stocktaker there on the day. Joule's will not buy back opened stock so best to sell it The inventory will be checked on the day, there will be a 2 year depreciation. Andy will be leaving more items to hopefully offset this. This can be drawn up in advance Andy has cancelled the card machine and cancelled the phone. The chimney has a been capped so the scaffolding should be down soon. Andy asked about the loss adjuster. John is not sure that this will be an insurance claim at the moment as the value may sit under the excess threshold	Actions
Trade Andy said that trade has been dire since the chimney with no sky sports and limited restaurant.	
BEER BRANDS & BAR SERVERY	Actions
MARKETING –	Actions
TOP TAP	ACTIONS
PROPERTY	ACTIONS

Appendix B – Kathy and Jim – August 2020 – January 2023

Appendix B1 – Business meeting notes, 21st August 2020

Tap house Business Meeting Notes

TAP White Horse Overton	21 Aug 2020
GENERAL NOTES John visited Kathy after the first week of trading. The pub was steady with trade with a mix of customers. The pub was well represented and service friendly Trade has been mixed with Saturday being strong and then Sunday quieter. Social distancing , one way rules, track and trace are all in place. John confirmed that no rent is payable yet as the pub finds its way in the market. This will be reviewed regularly to ensure all is good Jim gave John a list of all of the jobs for getting ready These are Garden clear, prep, benches , electrics £1000 Freezer Disposal £198 Glass replacement for atrium £134 Glass fitting atrium £100 Tap Repair £75 Skip £228 John to arrange for a credit for total sum of £1730 John asked Jim to send the £5k deposit over to the brewery. Bank details on an e mail to Kathy Kathy asked about paying the brewery. John said we can sort out the appropriate time. Week one was two soon so it can go on the next one. John to finalise inventory for the pub this week Kathy will need to contact PRS/PPL. Understate the amount of entertainment as this year there may be none with covid restrictions John ran through the insurance cover being buildings, public liability and employer liability but not personal contents not owned by Joule's	No rent to be charged at the moment Depost to be paid JA to credit prep work
BEER BRANDS & BAR SERVERY JA arranged for two pins to be available to collect from the Brewery The Monk is not selling. JA agreed to credit the tub back.	Actions

JA ran through the process about keeping tubs open for three days after which quality will dip. A sample should be tasted each day. The monk has been on seven days and although testing on all three proved good, it may be worth taking it off now. With the limited volume pumped there is a low chance of mass oxidisation but better to be safe. Jim will collect form the brewery.	
MARKETING	Actions
John spoke about facebook posting. Good practice would be to put a Joule's product with posts There is a competition being launched for the best Joule's inspired posts for the rest of August. The T shirt promotion starts on the 28th which will be a good trade incentive	
TOP TAP	ACTIONS
This was not discussed at this meeting	
PROPERTY	ACTIONS
The following issues are outstanding for Joule's to pick up FA/EL testing and certs Chimney sweep Cellar cooling service New light fitting – JA to pick up with V	Trades to be lined up for completing the works
FOOD OFFER	ACTIONS
Kathy is aiming to launch food next week	
NEXT MEETING	

Appendix B2 – Business meeting notes, 4th September 2020

Tap house Business Meeting Notes

TAP White Horse , Overton	4 Sep 2020
GENERAL NOTES John visited Kathy for a business review and to run through the inventory to put it all in writing The pub is well presented and clean and smells good. The sales are on the up with last week getting above £3k for the first time. This is positive but still a tough business profile. John agreed to suspend any rental discussions for the time being while the business grows and stabilises. In terms of paying the account, it was agreed to hold the deposit build and get the trading account straight first. If it gets behind it will cause a problem. Kathy has sent the CCJ information to Beckie for the insurers The inventory list was completed and site walked. Kathy says the glass and potwash are not working, JA to order new and put them on the inventory	Trading account to be paid before the deposit is built .Beckie to manage this with Kathy JA to arrange a glass wash and pot wash Rent to be held at zero currently
BEER BRANDS & BAR SERVERY Monk is still relatively slow, Kathy is ordering pins to avoid losses. Staropramen selling well New handles for Mortimers required. JA requested in call	Actions Sam Ordered new handles for the t bars
MARKETING	Actions
Facebook is an opportunity to dive footfall. Kathy is struggling to get time to sort it at present. JA thinks this is really important and free. Ideas could be great pint, line cleaning , food, football, garden area	
TOP TAP	ACTIONS
This was not discussed but the pub is well presented and clean	
PROPERTY	ACTIONS
External decorations are being completed this week and guttering etc.. New inventory to be ordered by John Gus to come and complete chimney sweep	

Appendix B3 – Business meeting notes, 8th October 2020

TAP White Horse Overton	8 October
GENERAL NOTES John visited the White Horse to see trade after 1 week of enhanced lockdown in Wales JA to arrange credit of £33 and £28 for light cover and sump pump. Kathy has amended the Risk Assessment to show the new legislation on site Several more items on the inventory are not working – 2 x hot water urn, 1 x desert fridge. JA to finalise with the new equipment that has not arrived.	Credit fo £61
BEER BRANDS & BAR SERVERY The downturn in trade following the recent restrictions is proving difficult. John agreed to give a free pin Of Kolkata as a new line to try and donate a blonde every week for the next month to see what happens	Actions Blonde to be put on free each week for the next month
MARKETING	Actions
The t shirt promotion has gone well The beat the die is next. JA to drop off pack next week . Joule's will credit back a pint of pale for every pound donated Bobble hat will follow John to sponsor a free pint promotion for the rugby, buy 9 get 1 free Kathy to look at her business plan for more ideas on marketing	Ja to drop off beat the die pack for next promo Pip to sort out collector card for rugby
TOP TAP	ACTIONS
This was not discussed	
PROPERTY	ACTIONS
The heating is now working James asked if the heating could be zoned and where the thermostat is Fire Alarm and EL to be complted by Jason, there is also a light on the external sign to look at	Ja to find out about heating system Electrician to be sent to complete works
FOOD OFFER	ACTIONS
Food has been put on hold at the moment as there was no uptake in booking it in advance and there is too much risk relying on walk up trade in uncertain times	

Appendix B4 – Business meeting notes, 10th November 2020

Tap house Business Meeting Notes

TAP White Horse	10 November
GENERAL NOTES John visited Kathy following the lockdown firebreak in Wales. Kathy opened yesterday and although low sales were better than a normal Monday. Over lockdown food takeaways provided some income but low. Food will remain on this basis in the short term. Kathy to look at themed nights to try to drive interest. The account was talked about as it is in arrears. Kathy is hoping for the grant to be received to pay it. John explained that some payments are needed. Kathy will pay for current stock and invoices and then once the grant is received the back position can be looked at. John is unable to release any money for equipment currently as there has been nothing received . Kathy is going to look at some ideas to bring more women into the pub, maybe pizza and prosecco or using the upstairs room.	JA to let Beckie know about the agreement to pay current invoices
Servery and Beers John to continue with the free Blonde in the short term. Stock lost over lockdown 2 x pins pale and 1 pin of monk	Actions Credits to be given for stocks, JA to arrange with BT
MARKETING	Actions
John dropped off both the beat the dice promotion and bobble hats, both of these could drive trade. John contacted Pip about a collectors card for the rugby – 9 pints. JA to get it sent out to Wem for speed	
TOP TAP	ACTIONS
PROPERTY	ACTIONS
JA to arrange for the electrician to come and do Fire Alarm, EL and light on swing sign	
FOOD OFFER	ACTIONS
Kathy is going to approach food slightly differently – takeaway has been solid and will continue and then a limited menu while it grows with themes being introduced	
NEXT MEETING	

Appendix B5 – Email from Commercial Director to Kathy, dated 16th June 2021

From: Jason Whittaker <jason@joulesbrewery.co.uk>
Subject: Notes - 15th June 2021
Date: 16 June 2021 at 10:51:46 BST
To: "'whitehorseoverton@yahoo.com'" <whitehorseoverton@yahoo.com>

Hi Kathy and Jim,

Thank you for your time yesterday, good to meet you both.

I have made a few notes for reference:-

- Cask marque – you would like to get the Cask Marque accreditation, Joules will contribute to 50% of the cost by sending a free 10 gallon of Pale Ale
- I have updated the inventory list and will bring with me next time for you to agree
- On your loan account there is an amount owed for stock for £745, but this was an error, so I will credit this off the account
- You are using the buy 9 pints get the 10th free cards during the football and lions tour – if you keep hold of the completed cards, I will credit the cost of the beer that you give away
- For our next meeting, can you compile a schedule of repairs and maintenance works that have been completed so we can go through and agree a value that we owe to you
- You're currently opening at 3pm in the week, but looking into opening at 12 – I would certainly give it a go for at least a couple of months to see how trade builds. I would encourage you try to make this change as soon as you can.
- Next time I come out, I will bring out a couple of examples of our food specifications that we're using at the Red Lion and Crown wharf to help standardise the food offering and potentially train another chef/cook
- We had a walk round the pub – in general, standards are good – I pointed out that the back garden needed a good spraying of weed killer. Once they're dead you can scrape out the mess, then you just need to keep on top of it by spraying every week or two. Also, I meant to mention that the handpulls and fonts looked they could do with a polish, and some brasso on the brass to help bring back the shine. Other than that, all good.

Finally, as you have been unable to trade for the majority of the time you have been at the pub and as you've not received much support with grants, I will credit the 4 months rent from December to March to help clear off some of the overdue debts.

From next week, Beckie will add £150/week onto your weekly figure which will be used to clear the overdue balance. Once cleared, we will continue with the £150/week extra payment which will be added to your deposit balance,
we will start to clear down the inventory loan – by paying £150/ week, this should all be clear within 2 years. If you are able to pay extra in the meantime, it would be helpful and once the Trade account is clear, the deposit is at £5k and inventory loan is cleared the £150/week payment will stop.

Hope that all makes sense – I will be in touch in few weeks to arrange to come out and see you again.

Any questions in the meantime, please let me know.

Regards,

Jason Whittaker
Commercial Director
07476 261 979



Joule's Brewery I Great Hales Street I Market Drayton I TF9

Appendix B6 – Business meeting notes, 12th November 2021

Joule's Brewery
Franchise Business Meeting Notes

Date: 12/11/21 Franchise Manager: JW
Tap House: White Horse, Overton Tenants – Kathy and Jim

Current Volume	9.4	Agreement Date Renewal	12th November 2021
3 months Volume	28.6	Last Property Inspection	N/a
Year to Date	73.9	Top Tap Status	In progress

Notes:

General, Trade , Beer Quality

Trade in general was pretty quiet in November, however, volumes are only 6% down on 2019. Roughly trading at £4.5k/week.

Local Masons group are visiting every 3rd Monday of the month which is helping trade on normally the quietest day of the week.

You have cancelled BT sports as it wasn't helping to increase trade.

Opening times are restricted to evenings and weekends as the day time trade is very quiet. I agree with this, no point opening in the day if no one is around. It also gives you chance to focus on the busier periods of the week.

In order to support you through the quieter times, and to assist with cashflow, I have agreed to a short term rent concession of 25% for November and December. This will be raised as a credit at the end of December and allocated to the overdue invoice.

Actions

JW to credit 25% for November and December

Financials and Credit Control

You are chipping away at your oldest invoices on your trade account, which are now almost cleared. We then need to agree the inventory value. Hopefully this will be agreed at the next meeting in December. I can then send an invoice.

Actions

JW to send financial summary of account
JW to check sky discount

Appendix B7 – Email from Commercial Director to Kathy, dated 18th November 2021

From: Jason Whittaker <jason@joulesbrewery.co.uk>
Subject: Statement & Invoice
Date: 18 November 2021 at 12:16:23 GMT
To: "'whitehorseoverton@yahoo.com'" <whitehorseoverton@yahoo.com>

Hi Kathy,

Please see attached, the Joules invoice for last week and up to date statement.

Figure for this week is £1,713.67 plus £150 against the old invoices = £1,863.67

I have agreed to reduce your rent to 75% through November and December which I propose to do through a credit note and then allocate to the oldest invoices if that's ok with you.

Any problems, please let me know.

Cheers,

Regards,

Jason Whittaker
Commercial Director
07476 261 979



Joule's Brewery I Great Hales Street I Market Drayton I TF9 1JP I 01630 654 400

Appendix B8 – Email exchange between Commercial Director and Kathy, dated 7th and 9th December 2021

From: Jason Whittaker <jason@joulesbrewery.co.uk>
Subject: RE: Invoices
Date: 9 December 2021 at 10:20:49 GMT
To: 'Kathy Jones' <whitehorseoverton@yahoo.com>

Hi Kathy,

Thank you for letting me know – that's absolutely no problem.

I have attached a statement for reference. if you can pay what you can this week, then catch up next week with the balance.

Cheers,

Regards,

Jason Whittaker
Commercial Director
07476 261 979



Joule's Brewery I Great Hales Street I Market Drayton I TF9 1JP I 01630 654 400

From: Kathy Jones <whitehorseoverton@yahoo.com>
Sent: 07 December 2021 22:30
To: Jason Whittaker <jason@joulesbrewery.co.uk>
Subject: Invoices

Hi Jason, hope you are well?

We had an awful week last week, worst ever I think! We barely made the beer and rent bill but on the plus side we've not had to order as much this week. I think last week and this week comes to about £3500 in total so I'm going to split it if that's okay? We've got a lot booked in this weekend so I'm not concerned about being able to get back up to date next Wednesday.

Hope that's okay but give me a ring if you want to have a chat. Otherwise see you in a couple of weeks

Regards

Kathy

Sent from Yahoo Mail for iPhone

Statement sent from Commercial Director to Kathy, dated 9th December 2021.

Joules Brewery Ltd
Great Hales Street
Market Drayton
Shropshire
TF9 1JP



White Horse - Overton
High Street
Overton
Wrexham

LL13 0DT

STATEMENT

Date	09/12/2021
Account Ref	WHITEHO2

Account Queries:
accounts@joulesbrewery.co.uk
T: 01630 654 400

Date	Ref	Details	Debit	Credit	Balance
22/04/2021	116202	Goods/Service	1,994.09		1,994.09
20/11/2021	119353	Goods/Service	62.12		2,056.21
29/11/2021	21441	Goods/Service	463.38		2,519.59
01/12/2021	119497	Goods/Service	256.12		2,775.71
02/12/2021	119554	Goods/Service	1,144.32		3,920.03
06/12/2021	21488	Goods/Service	463.38		4,383.41
08/12/2021	119601	Goods/Service	311.04		4,694.45

Current	Period 1	Period 2	Period 3	Older
£ 2,700.36	£ 0.00	£ 0.00	£ 0.00	£ 1,994.09

Amount Due
£ 4,694.45

VAT No: 928 833 194 Company Reg: 06492665 AWRS: XDAW00000101243



Joule's Brewery | Great Hales Street | Market Drayton | TF9 1JP | 01630 654 400

From: Kathy Jones <whitehorseoverton@yahoo.com>
Sent: 23 December 2021 00:20
To: Jason Whittaker <jason@joulesbrewery.co.uk>
Subject: Meeting today

Hi Jason

Just wanted to follow up from our meeting today as I felt uncomfortable during and after and having spoken to Jim this evening so did he. It felt like we were being really negative and we're absolutely not. We love this place and ideally wouldn't want to move but having tried so much we're very aware of its limitations. We love being in the trade and would very much like to stay with Joules (if you'll have us!) so hope that some of that came across and we didn't sound like moaning minnies whose heads are already out of the door.

We're happy to run the White Horse right up until the moment it's sold and will do everything we can to make it an attractive prospect for any buyer. We really hope that another Joules pub becomes available during that time for us, and if it did we would be very willing to also keep running the White Horse for as long as you needed us to.

As always, the brewery have been great in supporting us and we appreciate everything you've put in place today to get us through

a sticky time. As it happens tonight was a busy evening - I made 28 pies and we sold out!

Hope you have a great Christmas break, see you in January

Regards

Kathy and Jim

Sent from Yahoo Mail for iPhone

From: Jason Whittaker <jason@joulesbrewery.co.uk>
Subject: RE: Meeting today
Date: 23 December 2021 at 09:39:57 GMT
To: 'Kathy Jones' <whitehorseoverton@yahoo.com>

Hi Kathy,

Thanks for your email – no need to explain at all, it's a very difficult time so the concerns your raised are completely understandable. I'm really glad to hear that you're happy at the White Horse, and I can see you're trying everything, so I cant ask any more than that.

With regard to the future, I'll not be doing anything until I've discussed it with both of you, so for the short term, I'll support you as much as necessary to keep the doors open and trading.

I'll be coming out to see you every month going forward, so we'll just keep an open dialogue.

I saw on facebook that you had a few people booking tables, so that was great to see – and the post you did in front of the fire with the old no6 made me want to come and try it out, it looked fantastic.

So just keep doing what you're doing, things are changing so fast, so it's hard to predict what the future trade looks like, but rest assured, I'll doing everything I can to support you.

Hope you have a great xmas too, see you in the new year.

Cheers,

Regards,

Jason Whittaker
Commercial Director
07476 261 979

Appendix B10 – Email from Kathy to Commercial Director – proposed payment plan, dated 13th April 2022

From: Kathy Jones <Kathy.Jones@traffordhousingtrust.co.uk>
Subject: White Horse payment dates
Date: 13 April 2022 at 13:31:15 BST
To: Jason Whittaker <jason@joulesbrewery.co.uk>
Cc: "jimbenson6666@yahoo.com" <jimbenson6666@yahoo.com>

Hi Jason

Please see attached proposed payment plan setting out how we propose to get back in line with the DD cycle by 8th June. The proposal is intended to be realistic enough to allow for any quieter weeks without getting behind on other bills. From 8th June onwards we would then be in a position to go onto a fortnightly direct debit. If we are able to make small payments each week on top of what is proposed towards the April 2021 debt I will do so and let Callum know.

However, I start my new job on 16th May and have not yet had confirmation as to whether I will get paid at the end of May or will need to wait until the June salary run so I can't currently commit to starting the lump sum payments until June.

In the meantime we would really appreciate a conversation about works we have completed on the pub so far. I have attached a list of all the things that needed doing before we took on the tenancy but didn't happen due to the covid restrictions. We were happy to do these, and some have been credited to our account. It would be helpful to have a conversation about the remaining items as any agreed credits could go towards the inventory or deposit, reducing the length of time it would take for us to bring these up to date.

We are really keen to stay here and are happy to commit to continuing to develop the business if it is not marketed for sale. As you know, our nervousness at the moment is that we don't want to invest in the business if we may not be here in six months' time so we appreciate your openness about this. if we are to continue

there are a few things we really need to get on and do this summer to make the pub better and more efficient, as detailed below. I mention these at this stage as if we are to invest in these jobs it may impact upon our ability to pay towards the inventory/ deposit in some months.

- Get the roof and guttering sorted out (approx. £1k) – necessary to prevent water damage to the building and risk of loose roof tiles causing damage to people or property
- Drain down the heating system and flush it out – necessary to make the heating system more efficient and reduce heating oil costs (currently £1k/month due to oil costs)
- Fit a woodburning stove in the restaurant area – to reduce heating costs and make the restaurant more cosy and appealing in Autumn/Winter months
- Fit external lighting around the courtyard – to improve our beer garden offer (a USP that the Club don't have) and allow people to sit out for longer on warmer nights

As I mentioned when we spoke last week, we are currently looking at refreshing our food offer, increasing our opening times, and bringing in a full time chef as I will be limited as to what I can do on weekdays once I start my new job. We don't know how it will go, and had limited success when we tried this in the summer months last year so our proposal is that we trial this again from mid-May to mid-September and then review again whether we have Summer opening hours and Winter opening hours.

Sorry for the long e-mail! Would be good to arrange a chat once you've had time to go through everything and agree a way forward 😊

Regards

Kathy

Appendix B11 – Outstanding costs owing to Joule's Brewery

Joules Brewery Ltd
Great Hales Street
Market Drayton
Shropshire
TF9 1JP



White Horse - Overton
High Street
Overton
Wrexham

LL13 0DT

STATEMENT

Date	27/05/2022
Account Ref	WHITEHO2

Account Queries:
accounts@joulesbrewery.co.uk
T: 01630 654 400

Date	Ref	Details	Debit	Credit	Balance
22/04/2021	116202	Goods/Service	686.44		686.44
20/01/2022	21769	Goods/Service	8,116.80		8,803.24
13/04/2022	121380	Goods/Service	497.56		9,300.80
13/04/2022	121487	Goods/Service	852.95		10,153.75
18/04/2022	22381	Goods/Service	463.38		10,617.13
20/04/2022	121450	Goods/Service	236.11		10,853.24
20/04/2022	121536	Goods/Service	499.86		11,353.10
25/04/2022	22390	Goods/Service	463.38		11,816.48
27/04/2022	121596	Goods/Service	732.44		12,548.92
28/04/2022	121670	Goods/Service	1,404.33		13,953.25
02/05/2022	22440	Goods/Service	463.38		14,416.63
04/05/2022	121686	Goods/Service	332.01		14,748.64
04/05/2022	121723	Goods/Service	2,199.46		16,948.10
05/05/2022	121747	Goods/Service	517.59		17,465.69
09/05/2022	22492	Goods/Service	463.38		17,929.07
10/05/2022	5643	Credit		2,199.46	15,729.61
11/05/2022	121795	Goods/Service	257.09		15,986.70
12/05/2022	121859	Goods/Service	695.15		16,681.85
16/05/2022	22582	Goods/Service	463.38		17,145.23
18/05/2022	121902	Goods/Service	257.09		17,402.32
19/05/2022	121981	Goods/Service	886.75		18,289.07
23/05/2022	22587	Goods/Service	463.38		18,752.45

Joules Brewery Ltd
Great Hales Street
Market Drayton
Shropshire
TF9 1JP

LOVE BEER LOVE PUBS

STATEMENT

Date	27/05/2022
Account Ref	WHITEHO2

White Horse - Overton
High Street
Overton
Wrexham

LL13 0DT

Account Queries:
accounts@joulesbrewery.co.uk
T: 01630 654 400

Date	Ref	Details	Debit	Credit	Balance
25/05/2022	122008	Goods/Service	592.19		19,344.64

Current	Period 1	Period 2	Period 3	Older
£ 10,541.40	£ 0.00	£ 0.00	£ 8,116.80	£ 686.44

Amount Due
£ 19,344.64

VAT No: 928 833 194 Company Reg: 06492665 AWRS: XDAW00000101243

Appendix B12 – Business meeting notes, 15th July 2022

Joule's Brewery
Franchise Business Meeting Notes

Date: 15/07/2022 Franchise Manager: Rachel
Tap House: White Horse Overton Present: Rachel, Kathy & Jim
Notes:

Current Volume	4.8 BBL	Agreement Renewal Date	15/07/2022
3 Months Volume	27.5 BBL	Last Property Inspection	Jul-19
Year to Date Volume	37.9 BBL	Top Tap Status	TBC
Last Cellar Check		Cellar Score	TBC
		EHO Scores on the Doors	4

Trade

Great to see you both today, thank you for your time, it's been good to have a sit down with you both and to get an understanding of the site and the business.

I know you haven't had a visit from the brewery since start of the year, I am holding the site now Jason has left and I will ensure that a monthly meeting is taking place going forward.

Trade has been up and down and you are averaging 3.6k weekly.

Getting prepared for a funeral taking place today.

Trade builders/ROTW – karaoke nights, Bangor races ladies day, quiz nights, pie night, fish night amd brunch club first Sat of the month, Sunday Lunch. Kathy keen to reintroduce theme nights.

Kathy was in the kitchen full time, but you have now hired a chef and you are back to work

Trade – Actions

Commercial/ Licensing/ Credit Control / Office Support

Trade account is sat at £23,998.03.

Kathy thanks for you payments the last 2 weeks. If we keep on top of this and communicate with Callum how much you're paying and what invoices they relate to.

An old invoice from 22/04/21 (Inv 116202) £686.44 outstanding.

Inventory £8,116.80 – you mentioned the inventory wasn't explained on entry and I can only apologise for this not being explained to you when you took on the pub, certain items were broken and disposed of – this is something we need to work through. Callum has passed me over an inventory list from Jason.

We discussed installation of your new kitchen equipment. If you decided to end your tenancy you would write a inventory list for the incoming tenant to purchase. However the incoming tenants wouldn't be obliged to purchase items.

Commercial – Actions

Kathy – communicate with Callum each week payment, how much your paying and what it relates to.
Inventory – once we get to the bottom of this, we will agree a payment plan

Beer, Quality & POS Actions

Pale Ale doesn't sell at the White Horse so that isn't currently on the bar.

Beer club & seasonals are very popular – especially Frisky Rabbit and Hawaii.

Blonde best seller and super Blonde went very well.

Guinness – Guinness isn't a big seller and you have discussed taking it off the bar, there is also an option to buy in the 6.6gs of Guinness.

If you decide to take Guinness off you have a spare spot on the bar. I would look at trying Stone Ale on your spare line – these are available in 6.6gs as well. Have a think and let me know we can put a RFW in with Coors and I will happily support you with 1 x FOC to try

Cellar

Not discussed

Cellar Actions

Top Tap

Not discussed

Top Tap Standard	Action
First Glance	
Shop Counter	
Comfortable & Cosy	
Perfect Pint	
Every Seat	
Gloss, Glow, Polish and Twinkle	
Brewery Tap Tone	

Atmosphere and Music	
Inside Out	
Magic Messaging	

Actions

Rhythm of the Week

Monday – Quiz night
Tuesday – League Quiz night (Winter)
Wednesday – Pie Night
Thursday – Fish Night
Friday – Karaoke every fortnight
Saturday – Brunch club (First Saturday of the month, also on race days)
-Kathy looking to reintroduce theme nights – starting with Italian night
Sunday – Sunday Lunch

Actions

Have a think what you could put on on a Tuesday to boost trade. Look across the estate at other Taps social media for inspiration.

Events & Marketing

Menus – Pip to print menus on brown card

Bangor Races Ladies Day – breakfast & Transport from the pub to racecourse – 29th July

Karaoke – popular nights, more popular than band nights – difficult layout with bands.

Actions

Kathy – send over menus asap for printing

Furniture
Some wobbly chairs

Actions

Kathy – send over how many wobbly chairs you have and we can rearrange collection

Property

Missing roof tiles, gutter issues – Kathy has a contact who has quoted approx.. 1k for cherry tower hire and repair works to roof and gutters. Struggling to get hold of him now.

Electrics in the kitchen, - bad wiring Jim has sorted this.

Sandstone around windows is deteriorating

Property & Garden Actions

Kathy to chase up contact for roof

Jim to send works completed and cost for electric works in the kitchen

Fire alarm and emergency light tests to be completed (tenant cost)

Joule's to book in full Property Assessment

Property list of jobs complete on entry to the pub – send over

Food & Kitchen

Serve not food on Monday and Tuesdays.

New chef has been employed.

Forward Planning – What are we focusing on?

Bringing down the debt, repayments and inventory

NEXT MEETING DATE: 19th August 11am