



Development  
Trusts Association  
Scotland

A Thriving Community-led Network

# **New Futures: Former Places of Worship**

## **Community Ownership Support Service**



# What is the 'New Futures: Former Places of Worship' programme?

- A three-year programme (January 2025 – December 2027)
- Funded by National Lottery Heritage Fund, Historic Environment Scotland and Development Trusts Association Scotland
- To provide enhanced support to community groups considering taking on a church across Scotland
- In direct response to the significant and unprecedented number of former places of worship that are due to for disposal over the next several years
- Staffing: Two Churches Advisors (with a third in 2026) and a Churches Programme Officer (two over the course of the programme)



HISTORIC  
ENVIRONMENT  
SCOTLAND

ÀRAINNEACHD  
EACHDRAIDHEIL  
ALBA



Development  
Trusts Association  
Scotland

A Thriving Community-led Network



# Who delivers the programme, and what does it offer?

- The [Community Ownership Support Service](#), within the [Development Trusts Association Scotland](#)



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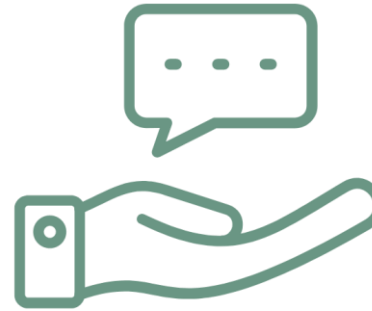
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**Claire Martin**  
Churches Advisor

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## Advice & Support



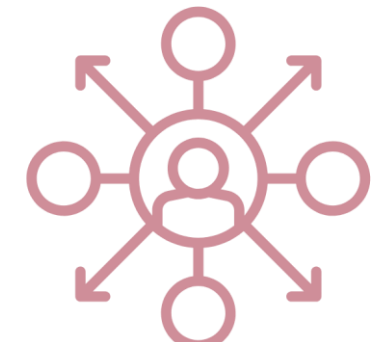
## Training & Resources



## Networking & Events



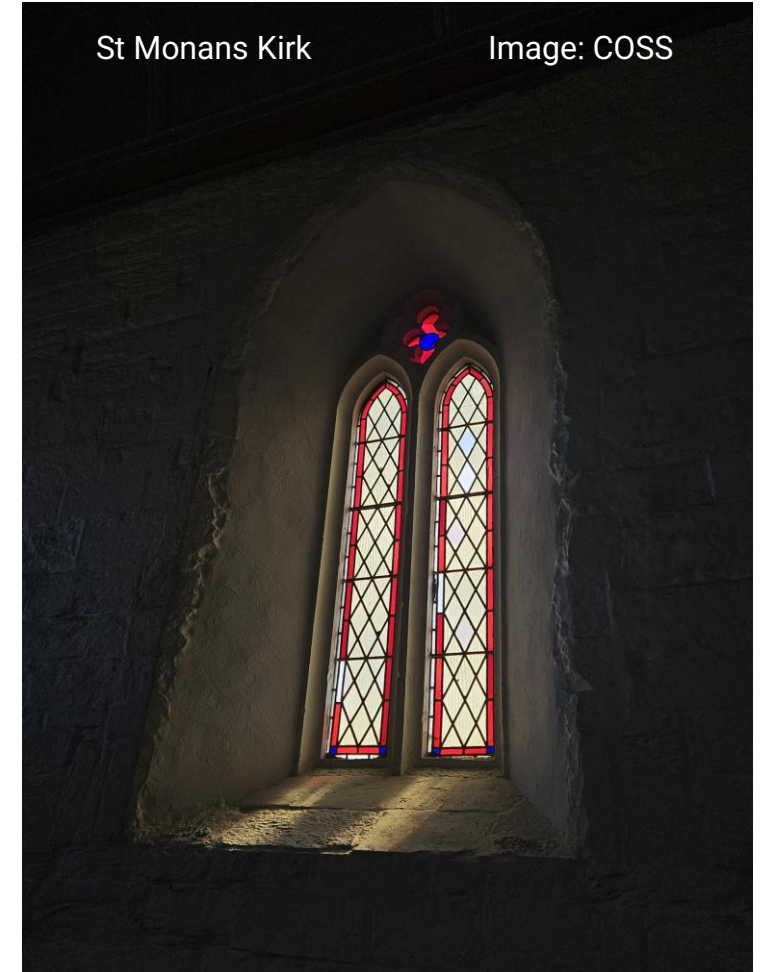
## Representation & Influencing





# Today's workshop: Business Planning

- Presentation from Claire Martin, Churches Advisor, South Scotland
- Q&A
- Housekeeping:
  - Please keep yourselves on mute, to avoid background noise
  - Feel free to introduce yourselves in the chat; and if possible, put your name and church building in your Zoom profile
  - Please also put any questions in the chat
  - Please keep any sensitive information confidential (Chatham House Rule) – this session isn't being recorded
- Follow up:
  - We will send the slides out by email
  - Feedback forms – this week and in three months' time
  - Get in touch! With us – and each other (via us if you'd prefer)





# Today's workshop: Business Planning



Dreel Halls, Anstruther

Image: COSS

## Overview:

- What is a business plan for?
- Content of business plan – an overview
- Generating income – who can help & case studies
- The financials – an overview
- Marketing tools and techniques
- Governance & planning
- Top tips
- Sources of support



# What (and who) is our Business Plan for?

- YOU! The Directors of the Company / Trustees of the Charity
- It may also be helpful for funders / a condition of grant funding
- It is an essential document to give confidence (to you, your community and funders) that you have a viable and sustainable proposal to ensure the long-term success of an important community asset





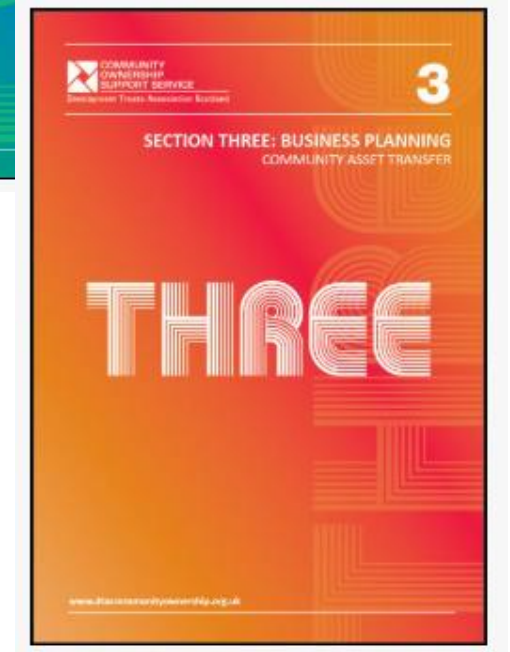
# What's the difference between a Feasibility Study and a Business Plan?

## Feasibility Study:

- The research in advance of a business plan
- Is it feasible? i.e. Can it be done?
- Is it viable? Can we afford it? Will it be financially sustainable?
- COSS resource: [2-COSS-Module-2-Feasibility.pdf](#)

## Business Plan:

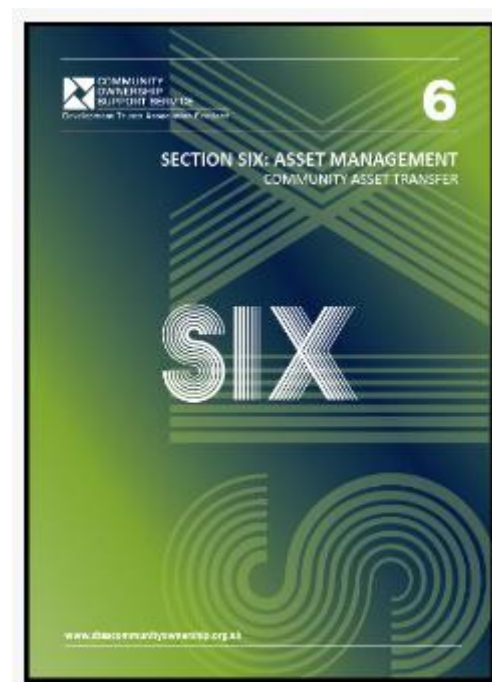
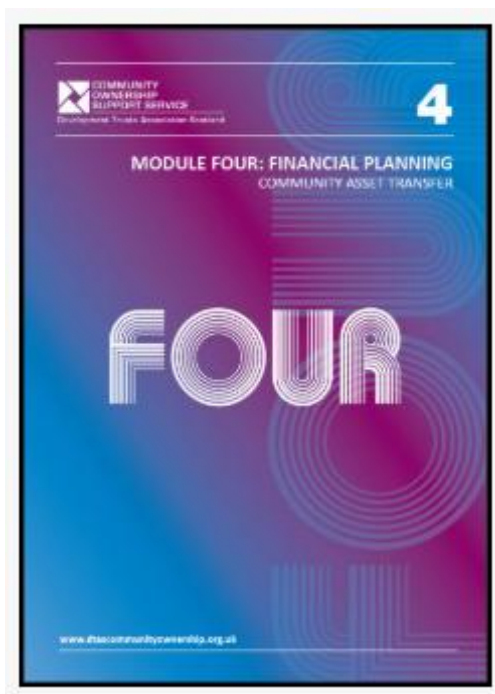
- Setting out the delivery of the project
- 'Investment ready' / 'operational'
- It is never a static document – it should be designed to evolve
- COSS resource: [3-COSS-Module-3-Business-Planning.pdf](#)





# Other COSS resources

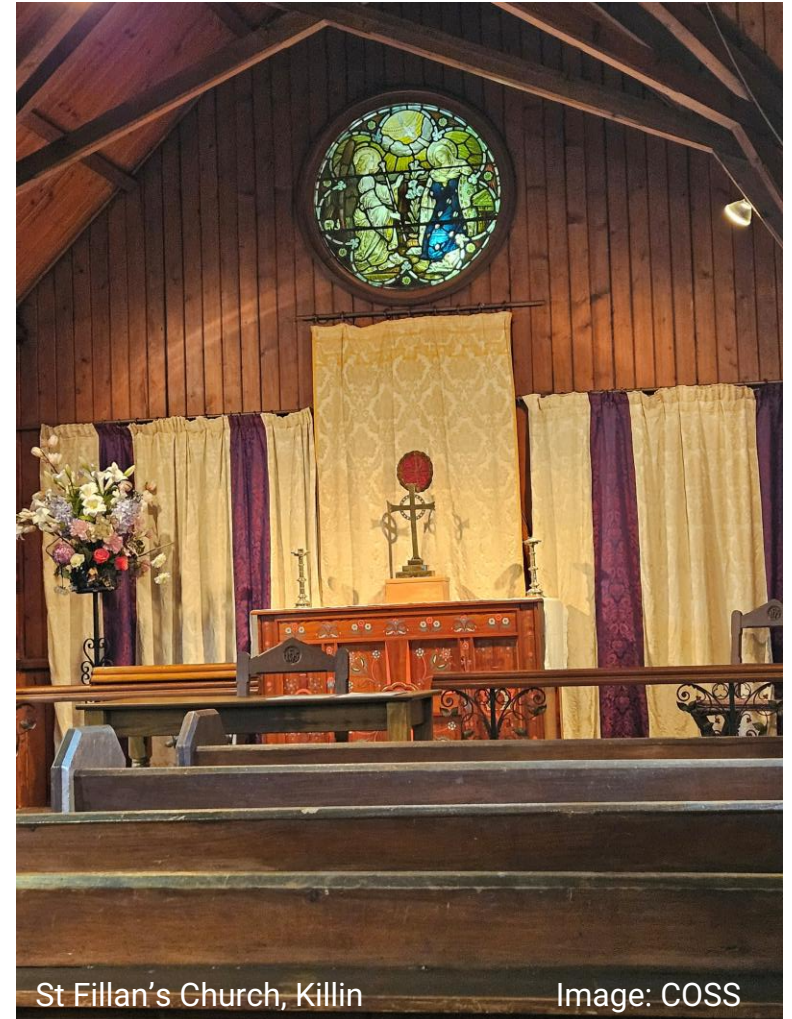
- Financial Planning: [4-COSS-Module-4-Financial-Planning.pdf](#)
- Governance and People: [5-COSS-Module-5-Governance-and-People.pdf](#)
- Asset Management: [6-COSS-Module-6-Asset-Management\\_0.pdf](#)





# Who should write our Business Plan?

- YOU! The Directors of the Company / Trustees of the Charity – you know your project best
- The three key questions:
  - What can we do ourselves?
    - Carry out a skills audit
  - What can we get for free?
    - Support from e.g. [Third Sector Interface](#) / [Highlands and Islands Enterprise](#) / [South of Scotland Enterprise](#) / [Business Gateway](#) / [Social Enterprise Scotland](#)
    - [Accelerate - Community Enterprise](#) / [Just Enterprise](#)
  - What external support do we need to buy in?
- At all stages, the organisation needs to retain control over the evolution of the business plan, so that it you are confident that you can deliver it



St Fillan's Church, Killin

Image: COSS



# Buying in (commissioning) support

- Step 4 of [Ten Steps to Community Ownership](#)
- [Working well with consultants: Tuesday July 15 at 2:00pm](#)

## Working well with consultants

A webinar to upskill community groups' Board & staff in  
working with consultants

*DTAS Provisional and Full Members, COSS clients and  
Democratic Finance supported organisations*



## TEN STEPS TO COMMUNITY OWNERSHIP

[www.hie.co.uk](http://www.hie.co.uk)

### STEP 4 FINDING EXPERT HELP

This guide provides guidance on how to handle tasks that require specific technical expertise during the acquisition process. Before turning to a consultant, it is vital to have a clear idea of what exactly you are looking for assistance with, and to explore various other support options available to you.

**THIS SHOULD NOT BE TAKEN AS SPECIFIC ADVICE FOR YOUR PROJECT. AS WITH ALL CONTRACTUAL AGREEMENTS, IT IS ADVISED THAT COMMUNITY GROUPS TAKE LEGAL ADVICE BEFORE ENTERING INTO ANY OPTION AGREEMENT.**





# Buying in (commissioning) support

- Funding:
  - [Beyond The Usual Suspects](#)
  - Crowdfunders:
    - [Eigg](#)
    - [Troon Old Parish](#)
  - The Scottish Land Fund (Stage 1):
    - [Scottish Land Fund](#)
    - See page 7 re Stage 1: [Scottish Land Fund Guidance Notes](#)
  - The Architectural Heritage Fund (Project Viability Grant):
    - [The Architectural Heritage Fund](#)



## Scottish Land Fund Ionmhas Fearainn na h-Alba

Delivered by  
THE NATIONAL LOTTERY  
COMMUNITY FUND

H I E  
Highlands and Islands Enterprise  
Ionairt na Gàidhealtachd 'n nan Eilean

Funded by



Scottish Government  
Riaghaltas na h-Alba  
gov.scot

# AHF

Transforming  
Heritage



# What should our Business Plan sound like?

➤ [Plain English free guides](#)

"he explained the urban context, the massing and materiality, the current uses and finally the connectivity and permeability"

[Glasgow's Golden Z Area of Focus Workshop Report](#) (p.5)

"By considering the constituent parts of the masterplan in relation to one another and how they might share resources to benefit from their proximities in order we aspire to build a sustainable model which maximises the investment for the benefit of the immediate community. A clear and coherent programme driven masterplan is the key to unlocking the full potential of this site and creating an intergenerational, inclusive learning environment where social well-being and care are provided for all generations of the Eyemouth Community."

Scottish Borders Council 2019 [proposal for a Community Campus in Eyemouth](#) (p.3)



# What should our Business Plan sound like?

From the consultant: “St Columba’s Church is currently in the ownership of the Church of Scotland. The local congregation is no longer able to sustain the building and the Church of Scotland Trustees indicated in 2021 that they wished to sell the property. The local community expressed a willingness to explore options to purchase and manage the church for community benefit which led to the establishment of Solas Eige in 2022. Prior to the current study an initial consultation carried out by the community brought forward a range of ideas to support local culture, heritage and tourism along with the continued use of the building for worship purposes.”

From the [Solas Eige](#) website:

“Solas Eige is Scottish Gaelic for “Light of Eigg” and is the name of the community organisation trying to purchase and restore St Columba’s Church, with the ambition to convert it for community use. The name was chosen to express Solas Eige’s vision of how the building could become a shining beacon for new activities on Eigg, just as our island is a “shining light” for renewable energy. Our mission is bring the building and the land to life and become “Ionad Solas Eige” - the Solas Eige centre.”



Image: Solas Eige



Our logo is inspired by the Tree of Life stencils inside the church as well as its lancet windows and pitched roof



# What should our Business Plan not do?

➤ p.10 of Module 3

## Note on Business Plan Don'ts

- Don't make claims you can't back up
- Don't waffle
- Don't assume the reader knows the industry
- Don't leave out relevant facts and figures
- Don't overload on information
- Don't oversimplify
- Don't struggle with trying to make your plan fit a generic template



# What should our Business Plan cover?

- Why:
  - Motivation, vision and context
- Who:
  - The community
  - The organisation
- Where:
  - The church in the community context
- What:
  - The asset, i.e. the church buildings(s) / land
  - Activities
- How:
  - Organisational
  - Operational
  - Financials
- When:
  - Phasing
  - Project management





# Why?

- Motivation
- Vision
- Context
- [Bedrule Church Future](#)

Bedrule Church holds our history, and it should be part of our future.

The Church of Scotland is selling off hundreds of churches across the country. We could lose this focal point in our cultural landscape, or imagine Bedrule church as a place to celebrate community, hold our heritage, offer a welcome resource for visitors, and much more.



Image: COSS

We believe the church, in conjunction with the nearby village hall, have the potential to tap into all these communities by:

- Offering visitor information services for interpreting local culture, history, and archaeology,
- by adding to the area's tourism offering as a destination and thereby supporting local tourism businesses
- providing a space for performances, training days and traditional events such as weddings, christenings and funerals by all denominations
- providing a symbol of rural resilience for the area in the face of continuing degradation of rural services



# Who? The community (overview)

- How is the community defined?
- What data is available?
  - e.g. Local Development Plan
  - e.g. Local Place Plan
  - Other research
  - E.g. [Facts and figures about South Lanarkshire - South Lanarkshire Council](#)

Whalsay (old Norse for 'Whale Island') is situated to the east of the Shetland Mainland and has an area of 7.6 square miles (20 km<sup>2</sup>). Commonly called 'the Bonnie Isle', people have lived on Whalsay for over 4,000 years. The people are a close knit, self-reliant community with a distinct dialect and traditions. Fishing is the island's main industry and today, Whalsay is home to a fleet of some of the largest trawlers in Europe. Whalsay has also benefited from Shetland's oil windfall and enjoys relatively good infrastructure for such a remote community.

The main settlement is Symbister, where a regular roll on roll off ferry service connects the islands community with the mainland via Laxo. The crossing takes approximately 30 minutes.

There are a little over 1,100 residents on the isle but this number has been decreasing since 2015. In relative terms, Whalsay has an aging population with younger people moving away for education and work. Local employment is steady- many working aged residents are self-employed in skilled trades but there is a lack of diversity in the job market with too few options available.



Extract from Whalsay Kirk Business Plan

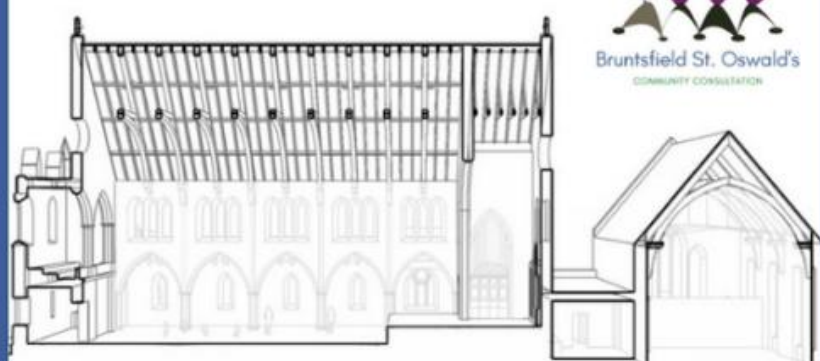


# Who? The community (overview)

- How have you involved your community?
- COSS resource: [Involving Your Community](#)
  - Informing / consulting / engaging



Draw what you would like to see inside St Ossies!





Bruntsfield St. Oswald's  
COMMUNITY CONSULTATION

Please return to Bruntsfield St. Oswald's Community Group,  
c/o Eric Liddell Centre, Holy Corner or  
Bruntsfield Primary School

What's your vision for Bruntsfield St. Oswalds?  
Share with us your ideas.

Your postcode:  
Your age:

 @bfieldstoswalds 

Extract from St Oswald's Centre Business Plan



# Who? The organisation (overview)

- History / overview
- Name, address, legal structure, if VAT registered
- Vision, Mission and Values
- Aims and objectives
- Organisational structure; membership / Board
- The team
- Experience / capacity to deliver the project
- Succession planning

## 4.1 Governance

Whalsay Kirk Development Company (WKDC) has 12 elected directors which is the maximum number allowed under the Articles of Association. All the directors are resident in the local community, well connected on the isle and involved in a range of other community and voluntary groups. There is a relatively good mix of people of different ages and stages (working aged people as well as retirees) with some having lived in Whalsay all our lives alongside other, more recent settlers. We are unified in our love of Whalsay and our desire to see the Kirk building continue to serve the community.

The Board is supported by a Council Community Involvement and Development Worker who lives locally and is committed to building the organisation's capacity. A skills audit revealed that we scored well in 'working with people', 'planning and management' and 'communications and marketing' although there are areas in these which could use some strengthening. Scoring less well was 'digital and information technology', 'evaluation work' and 'finance and fundraising' and these will need to be a focus going forwards. Most trustees are willing to undertake training to fill the gaps.

## 4.2 Legal Structure

WKDC incorporated as a Company Limited by Guarantee without share capital and is eligible as an Asset Transfer Body, as a legal identity, separate from its members. It can enter into contracts and hold property in its own name.

Extract from Whalsay Kirk Business Plan



# What? The church building(s) / land

- Google!
- Overview: [Scotland's Churches Trust](#)
- Listed buildings are detailed in the [Historic Environment Scotland database](#)
- Further information: [trove.scot](#)
- [Listed Buildings guidance](#)
- NB ecclesiastical exemption, whereby ecclesiastical buildings being used for ecclesiastical purposes can be altered without the need for Listed Building Consent: [Ecclesiastical Exemption | Historic Environment Scotland | HES](#)

SCOTLAND'S CHURCHES TRUST

HOME ABOUT GRANTS CHURCHES SUPPORT OUR WORK

**BEDRULE CHURCH**

Denomination: Church of Scotland  
Address: Bedrule, TD9 8TE  
Local Authority: Scottish Borders  
Listing: B  
WEBSITE

**CHURCH OVERVIEW**

On an ancient site, the church was rebuilt in 1804 and 1877 and again rebuilt beautifully in 1914 by T Greenshields Leadbetter as a cruciform church with a tower over the main west entrance. The church has a plaque commemorating Bishop Turnbull, founder of Glasgow University in 1451. Stained glass, including Guild centenary window 1902 and windows by Douglas Strachan 1922. Memorial with interesting link to wartime trigonometric decoding project. A copy of the Church Records inventory is available in the church vestibule. Fine views over Rule Valley to Ruberslaw.

**SERVICES**

Sundays: 9.30am or 11.00am, usually every three weeks, times change every four months; see notice-board for details.

**OPENING ARRANGEMENTS**

Open daily

HISTORIC ENVIRONMENT SCOTLAND | ÀRAINNEACHD EACHDRAIDHEIL ALBA

Home Search Downloads

Back to Results

Listed Building

The only legal part of the listing under the Planning (Listing Buildings and Conservation Areas) (Scotland) Act 1997 is the address/name of site. Addresses and building names may have changed since the date of listing - see 'About Listed Buildings' below for more information. The further details below the 'Address/Name of Site' are provided for information purposes only.

Address/Name of Site

**BEDRULE CHURCH**  
LB4180

Status: Designated

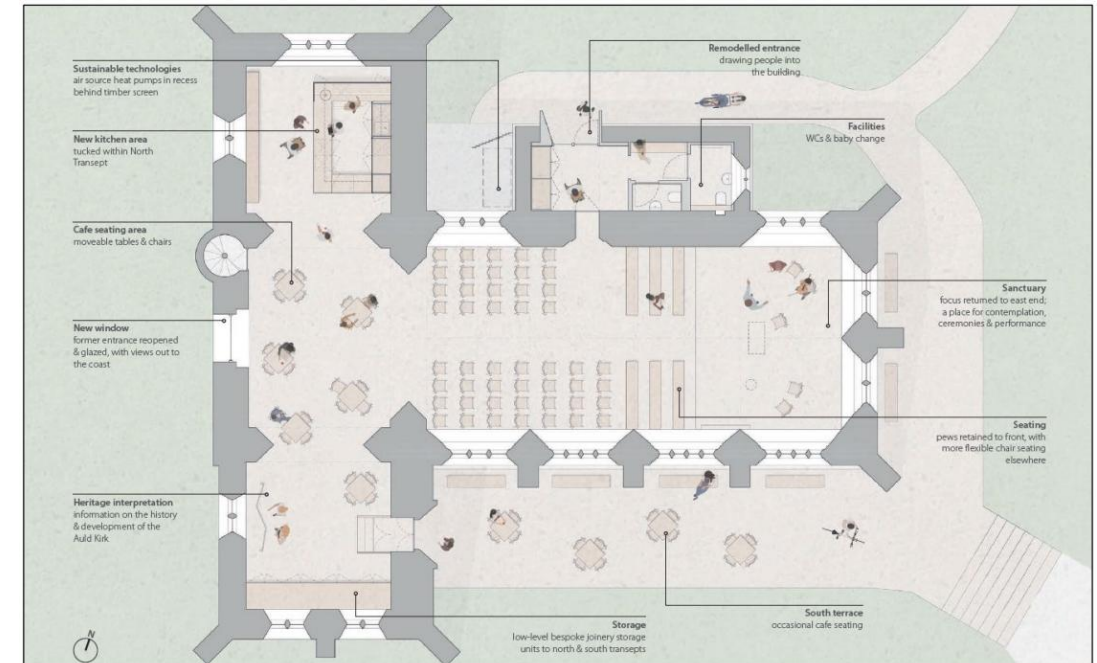
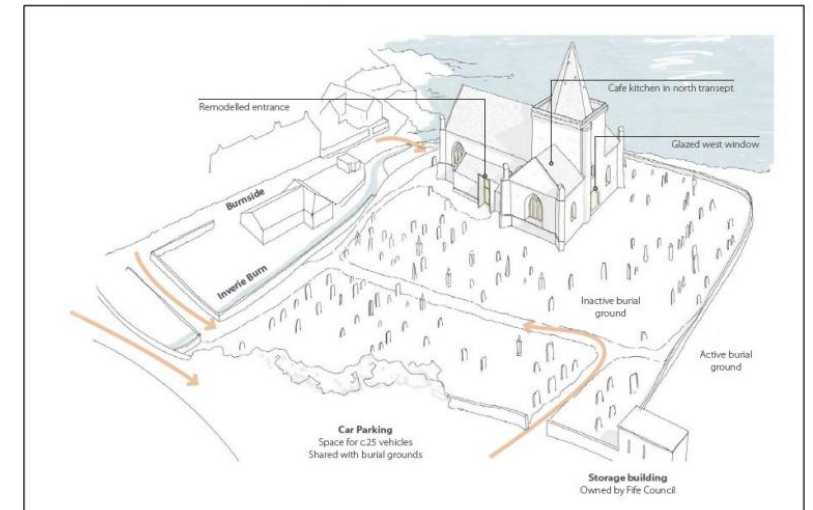
**Summary**

Category B	Local Authority Scottish Borders	NGR NT 59922 17925
Date Added 16/03/1971	Planning Authority Scottish Borders	Coordinates 359922, 617925
	Parish Bedrule	



# What? The church building(s) / land

- Overview
- Photographs
- Maps
- Plans
- Summary of information from other professionals:
  - Valuation
  - Building Condition Survey
  - Architect
  - Quantity Surveyor
  - Building contractor
  - Mechanical and / or electrical engineer



Extracts from St Monans Auld Kirk Business Plan

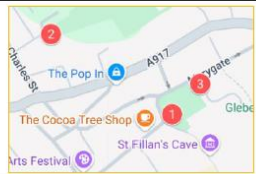
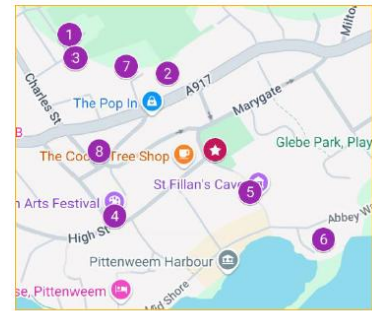


# Where? Asset mapping

- The church building in the context of the community



Asset	Description / facilities	Partnership opportunities / risk of displacement
<b>New Town Hall</b>  	<p>"The Pittenweem New Town Hall is available for private functions, meetings, and performances as well as being available for Funerals and Funeral Teas."</p> <p>Large hall (capacity 120 people)</p> <p>Fully furnished kitchen</p> <p>Stage area with pull down screen</p> <p>On-site parking (60 vehicles)</p> <p>Disabled accessible toilets</p> <p>Sound system</p> <p>Internet access</p>	<p>Buildings are dated / not used to capacity – listings for <a href="#">February</a> show between 3 and 5 bookings per week, Monday to Thursday</p> <p>Uncertainty over future sustainability of Management Committee, although part time jobs currently advertised on <a href="#">Facebook</a> (Hallkeeper / Cleaner, Secretary, Gardener, all £12/hr)</p> <p>Used by e.g. Community Council, East Neuk Art Club, dance classes, spiritualist church, indoor bowls, keep fit classes</p> <p>Is the low usage due to the nature of the offering, lack of active marketing, or the lack of demand?</p> <p>Kirk could be an alternative premises for those groups, if the New Town Hall closes – otherwise risk of displacement</p>
<b>Church Hall</b>  	<p>Pittenweem Church Hall hosts regular coffee mornings every Wednesday and has badminton and table tennis courts</p> <p>Facilities: Large hall, small hall, kitchen</p>	<p>Currently used by e.g. church coffee mornings, badminton club, dance classes; minimal bookings / not used to capacity</p> <p>Is the low usage due to the nature of the offering, lack of active marketing, or the lack of demand?</p> <p>Used as a venue during Pittenweem Arts Festival</p> <p>Activities could relocate to the Kirk when building is disposed of by the Church of Scotland</p>

<b>Churches</b> <ul style="list-style-type: none"><li>1 Pittenweem Kirk</li><li>2 Coastline Community Church</li><li>3 St John's Church</li></ul>	
<b>Community spaces</b> <ul style="list-style-type: none"><li>1 New Town Hall</li><li>2 Church Hall</li><li>3 Coastline Community Church</li><li>4 Pittenweem Arts Festival</li><li>5 Pittenweem Community Library and Informa...</li><li>6 Gyles Community Centre</li><li>7 Pittenweem Primary School</li><li>8 Scout Hall</li></ul>	

Extracts from Pittenweem Church Feasibility Study



# What are you going to do? Activities

- Themes / details
- What are the ideas?
- Where did they come from?
- How have they been tested with market research etc.?
- What's the context? Asset mapping / displacement
- What's the plan?
- Meantime use
- Longer term plans
- Examples from [Dreel Halls](#)



The poster features a background image of a coastal town with a church. It includes logos for FIFE WRITES, OSCR Registered Charity, and Dreel Halls. The text describes a creative writing project with five fortnightly sessions and a spoken word showcase on September 27th. It provides the location (Dreel Halls, Anstruther), start date (Thursday 24th July 2025), and time (10:30 - 12:30). A booking link is provided with a QR code, and contact information for enquiries is listed. Logos for funding partners are at the bottom.

**FIFE WRITES**

**OSCR** Registered Charity SC049857

**'Words from the Coast'**

A creative writing project held over five fortnightly sessions & concludes with a spoken word showcase event on Saturday the 27<sup>th</sup> of September.

**Dreel Halls, Anstruther**  
Starting on Thursday 24<sup>th</sup> July 2025  
10:30 - 12:30

Booking link here →

Enquiries to:  
fife.writes@gmail.com

Funded by:

**Dreel Halls**  
SCOTLAND

**Fife Communities Mental Health and Wellbeing Fund**

**fife voluntary action**



# What are you going to do? Activities

- What is the demand?
- p.15 of Module 2
- an example of a women's centre, interested in taking on a three storey building to expand their services in terms of women's counselling, training and education and also to start up two social enterprises in outside catering and childcare; they want to rent out four offices to support their sustainability and cover the cost of increasing the women's counselling services to meet current demand

Area	Details
Who are the users/existing and proposed?	<b>Women and young girls aged 14 upwards</b> <b>Café</b> – centre users <b>Training and education</b> – unemployed local women <b>Counselling</b> – women with mental health issues, victims of domestic violence <b>Childcare business</b> – local mothers and fathers <b>Outside catering</b> – community groups and businesses <b>Office rental</b> – local businesses / social enterprises
How many users are there at present?	<b>Childcare</b> – 30 per annum (at capacity – crèche only linked with education) 30 customers per day at internal <b>café</b> , (£120 per day turnover) 300 women on courses in <b>training and education</b> per annum 300 women in <b>counselling</b> per annum No current users for <b>office rental</b>
Demand	178 enquiries for <b>childcare</b> in 2016 78 outside <b>catering requests</b> in 2016 Waiting list of 127 women for <b>training and education</b> Waiting list of 116 for <b>counselling</b> In relation to <b>office rental</b> all local office provision is full. Estate agent confirmed there is demand for small office space in a secure building



# What are you going to do? Activities

- Asset mapping
- Competition
- p.16 of Module 2

Key competitor/ collaborator/other provider questions	Answers
Who else is delivering these services?	<p>No other women only facility within the area – three community organisations delivering training and education but offering different programmes and also at full capacity</p> <p>No social enterprise doing <b>outside catering</b>, but three private sector operators in the area – opportunity to attract customers with the #buysocial strapline</p> <p><b>No other childcare</b> facility within a three mile radius</p> <p>Enterprise agencies and private landlords are offering <b>office</b> accommodation but most of their offices are large</p>
What are the strengths of other providers competitors/ collaborators?	<p><b>Training and education</b> – some providers in the market. Good quality but no female only provision</p> <p><b>Outside catering</b> – some providers. All are expensive, all have good staff</p> <p><b>Childcare</b> – strong provider but not planning to expand</p> <p><b>Counselling</b> – Women's Aid are excellent but at capacity, local community women's group is also excellent (four miles away) but also at capacity</p> <p><b>Office rental</b> – enterprise agencies and private office rental providers are mixed in terms of the product they offer and the length of lease / license</p>
How will you compete/ collaborate with them?	<p>Collaborate where possible and fill a gap in the market which is not being provided for in the case of childcare, extra training provision, more counselling, small office rental in a secure building</p>
Do your competitors have the space and capacity to expand?	<p><b>Childcare</b> – all at capacity</p> <p><b>Training and education</b> – all local providers are at capacity and don't cater for the women only space</p> <p><b>Counselling</b> – everyone is at capacity in relation to counselling based on funding cuts</p> <p><b>Outside catering</b> – the private sector companies are still trying to increase their market share but do not have strong loyalty from local community customers: the enterprise agencies are not planning to expand to offer more office rental</p>



# What are you going to do? Market research

- p.29 of Module 3
- Business Gateway  
[Market Reports | Business Gateway](#) e.g.  
Ancestral Tourism,  
Childcare, Events  
Management, Wedding  
Services

## Primary research

- Experience/knowledge of working in the sector
- Past projects/delivery of services
- Monitoring and evaluation of projects/programmes provided
- Face-to-face survey/questionnaire
- Telephone survey/questionnaire
- Postal survey/questionnaire
- E-survey/questionnaire
- One-to-one meetings
- Focus group/panels
- Attending a conference, trade show or exhibition
- Observation/mystery shopping

## Secondary research

- Government reports/policies
- Public body reports/research
- Stakeholder reports/research
- Feasibility studies
- Social impact assessments
- Market research reports
- Census data
- Directories
- Competitors' websites, annual reports, brochures, etc.
- Magazines and newspapers
- Books and publications
- Trade associations and bodies
- Internet



# What are you going to do? Marketing

➤ p.34 of Module 3

Promotion	Advertising	Sales promotion	Public relations	Personal selling
<b>Traditional</b>	Signs Newspapers Magazines Brochures Business cards Exhibitions Trade shows Leaflets Posters Mail shots Merchandise Newsletters Radio Directory	BOGOF (Buy one get one free) Competitions Coupons Discounts Free consultations Free trials Gifts with purchases Loyalty incentives Opening offers Sales letters Special offers Trade show offers	AGMs Social impact reports Awards Competitions Editorials Press releases Newsletters Endorsements Networking Forums and advisory groups Presentations Launches Radio talk show Referrals Word of mouth Sponsorship	Cold calling Conference selling Elevator pitch Networking event Industry event Sales agents Distributors Sales representative Sales meeting Sales presentation Telemarketing
<b>Digital</b>	Online ads, e.g. <ul style="list-style-type: none"><li>• Pay per click</li><li>• Pop up</li><li>• Google ads</li><li>• Banners</li><li>• Facebook ads</li></ul> Website Viral campaigns Digital news flash Search engine optimisation Short messaging service	Digital coupons Digital vouchers Facebook ads Facebook competitions QR (quick response) codes	Social media <ul style="list-style-type: none"><li>• Facebook</li><li>• Twitter</li><li>• LinkedIn</li></ul> Blogs Forums Podcasts Linkages to other websites Interactive edutainment	Email Webinars LinkedIn Skype Conference calls



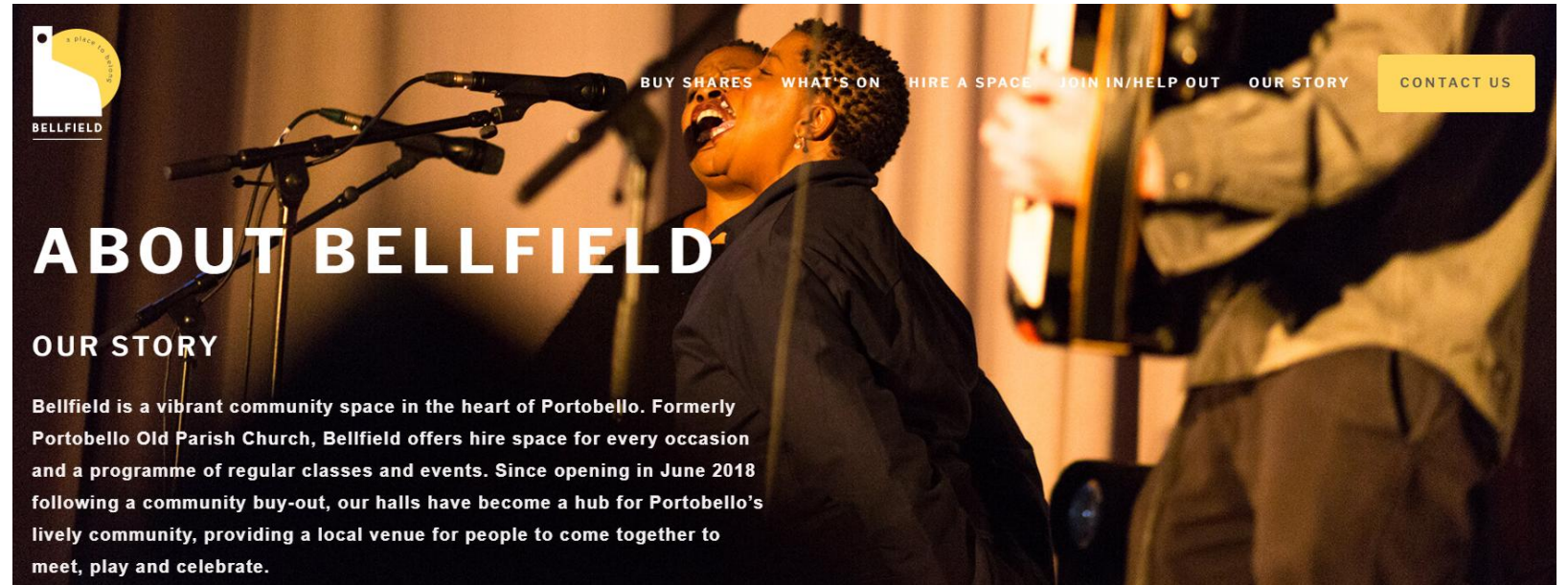
# What are you going to do? Marketing

## ➤ [Bellfield | Portobello's Community Hub](#)

Thanks to the huge success of the Bellfield's Big Build campaign and all you wonderful people for buying shares, we have got a LOT of data to process - for more than 1,100 shareholders!



So it's taking us a little bit longer than we'd hoped to issue share certificates. Please bear with us... we hope to issue the majority by end of July.



'Bellfield's Big Build'  
has raised a breathtaking  
£168,525  
Action Party now has  
over 1,400 members

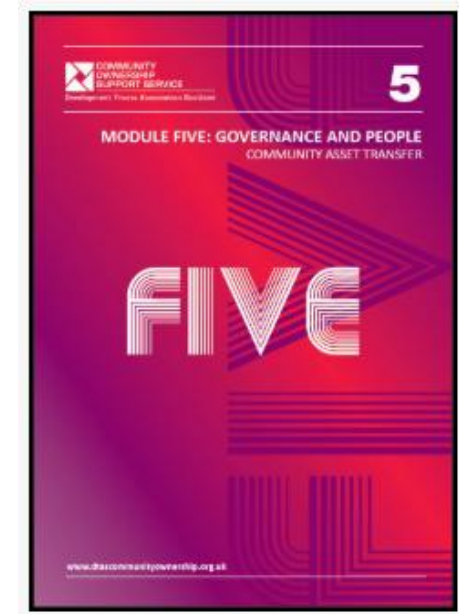
**THANK YOU!**





# How? Organisational

- See Module 5: [5-COSS-Module-5-Governance-and-People.pdf](#)
- Legal structure
- Board
  - Skills audit: see p.22 of Module 5
- Volunteers
- Staffing
- Policies and procedures



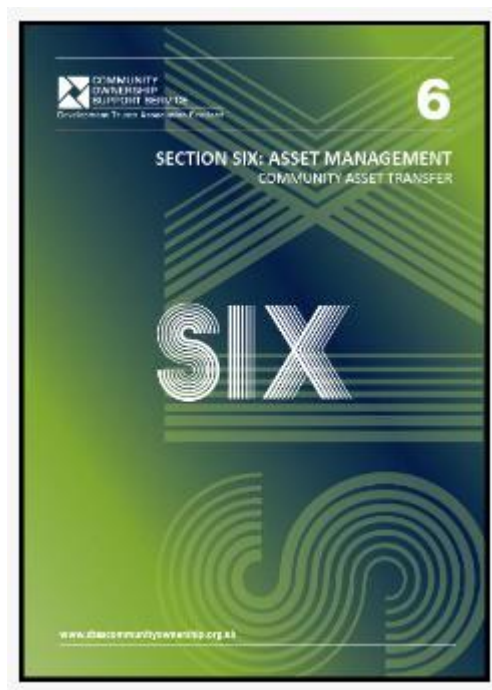
## *Organisational capacity*

- The Board is relatively large with 12 trustees. A skills audit was undertaken in early 2023 and though skilled in many areas, topics for development were identified as 'digital and information technology', 'evaluation work' and 'finance and fundraising'. These will need to be a focus going forwards.
- WKDC has the support of the Council's Community Engagement and Development Officer (a Whalsay resident) to help build capacity on the ground and link trustees to skills development opportunities.
- A detailed legal structure audit was undertaken and whilst WKDC has an appropriate legal structure for its purpose, gaining charitable status was identified as an advantage, particularly in relation to funding.

Extract from Whalsay Kirk Business Plan



# How? Operational



- Resources and operations
- Premises
- Equipment
- Technology
- Maintenance
- Management systems, e.g. accounting, monitoring and impact assessment
- Insurance, Health and Safety, data protection, policies and procedures
- See Module 6: [6-COSS-Module-6-Asset-Management\\_0.pdf](#)
- p.42 of Module 6

## Servicing and Testing

- Electrical fixed wiring
- Electrical PAT testing
- Emergency and exit lights
- Fire alarms
- Portable firefighting equipment
- Any renewable energy products (PV cells, turbines etc)
- Powered access doors
- Lifts
- Gas appliances test and certification
- Gas systems, including boilers
- Oil boilers and other oil-fired appliances
- Air conditioning systems
- Water quality sampling and chlorination
- Playground equipment
- Gym equipment
- Kitchen equipment: coffee machine
- Hearing loop systems
- Burglar alarms
- Control panel testing
- Other



# How? Operational

➤ p.6 and p.12 of Module 6

Facilities Management	
Activity	Potential tasks
Strategic Facilities Management	Property policies – who may rent or use an asset and on what terms Strategic asset management – how the asset delivers against key objectives Capital management – managing the investment in the property Corporate landlord responsibilities – insurance, statutory compliances Business risks and continuity – making sure the bills are paid and that the land/building remains usable
Site Maintenance and Management	Assign an officer in charge of/responsible for key functions of: <ul style="list-style-type: none"><li>• Fire prevention and health and safety</li><li>• Grounds maintenance</li><li>• Security</li><li>• Health and safety compliance</li><li>• Parking</li></ul>
Building Maintenance	Repairs and planning upgrades Cyclical and preventive maintenance
Contractor/Staff/Volunteer Management	Negotiating contracts with sub-contractors Management of services provided by staff, volunteers and third parties in respect of: <ul style="list-style-type: none"><li>• Cleaning</li><li>• Catering</li><li>• Grounds maintenance</li><li>• Security</li><li>• Repairs</li></ul>

Task	Decisions required			
	What is required	Who will arrange it	Who will do it	Staff, volunteer or contractor
<b>Insurance</b> (land/buildings/public liability/employers' liability/contents) For example: Develop specifications, inventories, risk assessments Negotiate and secure cover Renew				
<b>Marketing/letting space</b> For example: Preparation and agreement of terms of tenancies or leases Development of booking and hiring policies and prices Specifications of service contracts				
<b>Promotion/publicity</b> For example: Development and production of publicity materials Managing social media/websites				



# How? Financials



## Fundraising plan

Who might fund you?  
- short term and  
longer term.



## Start up or Development costs

What do you need to  
get started and  
how much will this  
cost? e.g.  
refurbishment,  
legal services...



## Profit & Loss Accounts

All your income net  
of operating costs  
showing net profit  
(or loss), shows  
fundamental health  
of project



## Cash flow forecast

When money will  
come in and flow  
back out, peaks and  
troughs, funder  
payments,  
seasonality, need for  
overdrafts etc



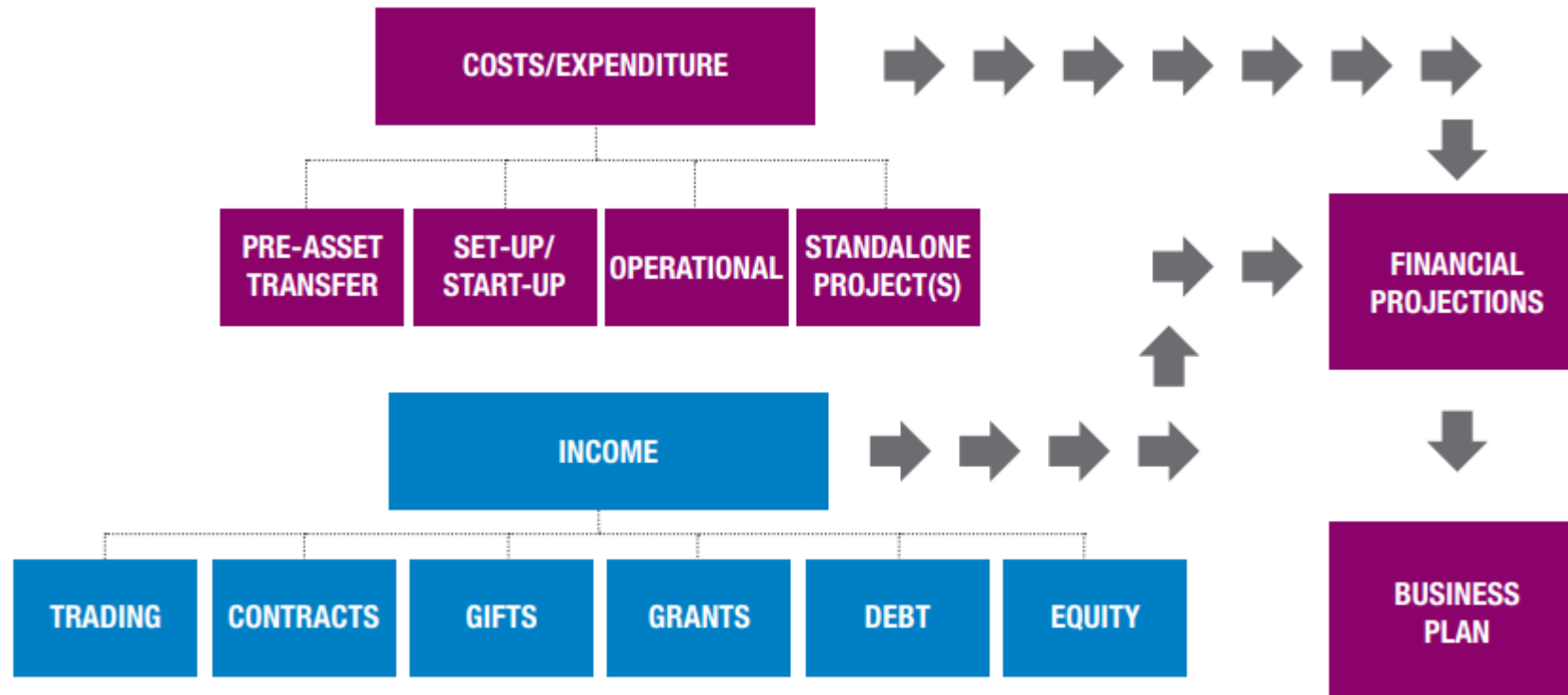
## Break even

How much you need  
to earn to break  
even, set your  
prices, keep you  
operational  
(through peaks and  
troughs) etc



# How? Financials

➤ p.6 of Module 4





- ## Extracts from Whalsay Kirk Business Plan

<b>Core Staffing costs</b>					
Core Posts	Salary	NI	Pension	Time	total
<b>Admin/Finance/Facilities Officer</b>	£25,000	£1,756	£1,250	0.5	£14,003
<b>Marketing and Development officer</b>	£27,000	£2,032	£1,350	0.2	£6,076
<b>Cleaner/Caretaker / Accomodation welcome person</b>	£20,000	£1,066	£1,000	0.2	£4,413
<b>Total</b>					£24,493
<b>Or one full time post</b>					



# How? Financials

➤ Windfarm monies,

Dalmellington:

➤ [Dalmellington Trust](#)

➤ Bedrule Church:

➤ [Bedrule Church Future](#)

➤ [Turnbull Clan](#)

## Kirk O' the Covenant Building (KOTC)

Dalmellington Parish Development Trust are delighted to announce the completion of the purchase of the Kirk of the Covenant building. The Church of Scotland recently put the building up for sale. Following the wishes of the community as demonstrated in the KOTC Feasibility Study and the Dalmellington Parish Community Action Plan, the Trust has been successful in securing this building for Community ownership. The purchase of this building has been funded by South Kyle Wind Farm Community Benefit Fund. £120,000 was allocated towards this project, this includes £105,000 purchase price plus legal and start up costs.

The future use and management of the building will be run by a stand-alone group, i.e., a group set up specifically for this purpose. A Group called the Friends' of The Kirk O' the Covenant has been set up and is led by Drew Filson, this Group is open to anyone in the Parish who wishes to join. For further details on joining the Group please contact [generaldpdt@outlook.com](mailto:generaldpdt@outlook.com)



**Turnbull Clan Association**

[Our Clan](#) ▼ [Happenings](#) ▼ [Genealogy](#) ▼ [Resources](#) ▼ [Log in](#) ▼

### Save Bedrule Kirk

**Bedrule Kirk, "heritage ground zero" of our Turnbull clan, is in peril, and we need your urgent help to save it.**

Bedrule Kirk is a historic Turnbull landmark with a breathtaking view across the Rulewater Valley to Ruberslaw mountain. The kirkyard, which holds the Turnbull cairn, is the final resting place of many of our ancestors. The sanctuary of the church is a holy place where the power of the faith of our fathers is tangible. The interior is beautifully decorated with the arms of our forebears, the Bishop William Turnbull plaque, and magnificent stained glass windows, including the famous Turnbull Window.

The Church of Scotland is closing and selling off Bedrule Kirk and others because they have run out of funds to maintain them.

**Bedrule Kirk is scheduled to be sold in July, with no guarantee of what will be done with it or even if it will be maintained unless it goes into the right hands.**

The Bedrule community-based grassroots effort *Bedrule Church Future* is raising funds to purchase the church and maintain it to be used for events in the community and beyond as a venue for weddings and similar special occasions. This will ensure that the church will remain open to our clan family and other visitors who want to appreciate the beautiful building and its interior.

Please join us in supporting the Bedrule Church Future steering group. We need to raise £35,000 (\$47,000) by July. This means that we must respond quickly and generously.

Your US tax-deductible contribution to this effort is vital and will be receipted by TCA.





# How? Financials

- Income and Expenditure
- p. 9 of Module 2
- p.7-17 of Module 4 for detailed breakdown of expenditure for an asset

Asset transfer phase	Examples of sources and application of income
Pre-start	Feasibility study grant
Set-up/start-up	Grants
	Equity
	Loans
Operational	Venue hire
	Letting of offices
	Café/outside catering services
	Contract to deliver a recycling service
	Fundraiser to fund an event or programme



# How? Financials

Summary financial forecast for the 5 years to 2031 are shown below.

		Apr-Dec 2026 meanwhile	2027 meanwhile	2028 closed	2029 reopen	2030 reopen	2031 reopen
<b>Weddings surplus</b>	Figure 22	10,608	18,626	-	52,927	62,814	84,934
<b>Events surplus</b>	Figure 23	2,026	3,001	-	2,654	2,765	2,876
<b>Café surplus</b>	Figure 26				2,170	3,741	5,704
<b>Total gross profit</b>		<b>12,634</b>	<b>21,626</b>	-	<b>57,751</b>	<b>69,320</b>	<b>93,514</b>
<b>Overheads</b>	Figure 27	10,635	20,465	-	35,332	42,669	54,348
<b>Staffing</b>	Figure 27			-	21,216	21,640	22,073
<b>Total indirect costs</b>		<b>10,635</b>	<b>20,465</b>	-	<b>56,547</b>	<b>64,309</b>	<b>76,421</b>
<b>Surplus</b>		<b>1,999</b>	<b>1,161</b>	-	<b>1,204</b>	<b>5,011</b>	<b>17,094</b>

Figure 23. Purchase and urgent repair costs phase to March 2026

	Cost	SLF	HES	Landfill	Fund-raising
<b>Purchase</b>	80,000	80,000			
<b>Legal Fees</b>	8,000	8,000			
<b>Building insurance</b>	20,000	20,000			
<b>Website</b>	4,000	4,000			
<b>Total capital</b>	<b>112,000</b>	<b>112,000</b>	-	-	-
<b>Project Development Officer to March 2026</b>	50,000	45,000	5,000		
<b>Urgent H&amp;S matters</b>	22,241	18,741	3,500		
<b>Urgent building repairs</b>	20,000	10,000	10,000		
<b>Interior redecoration</b>	10,000			7,500	2,500
<b>Building running costs Oct 25 - Mar 26</b>	5,000				5,000
<b>Total revenue</b>	<b>107,241</b>	<b>73,741</b>	<b>18,500</b>	<b>7,500</b>	<b>7,500</b>
<b>Total costs and funding</b>	<b>219,241</b>	<b>185,741</b>	<b>18,500</b>	<b>7,500</b>	<b>7,500</b>

Extracts from St Monans Auld Kirk Business Plan



# How? Risk Assessment

Key risk	Action required	By whom	By when	Cost/budget
Cost increasing on the construction	Agree price with contractor. Sign a legal agreement with penalties for late completion. Agree loan and grant income to cover cost. Build in a contingency with funder	CEO	June 2017	N/A
Failure to secure full funding	Source alternative funding. Complete projections and assess implication and viability	CEO	June 2017	N/A
Failure to secure 80% occupancy of office space in year one	Identify new customer groups, consider diversifying the use of the office, hot desking, weekly rental etc.	Finance Manager and CEO	July 2017	N/A

➤ p.45 of Module 2

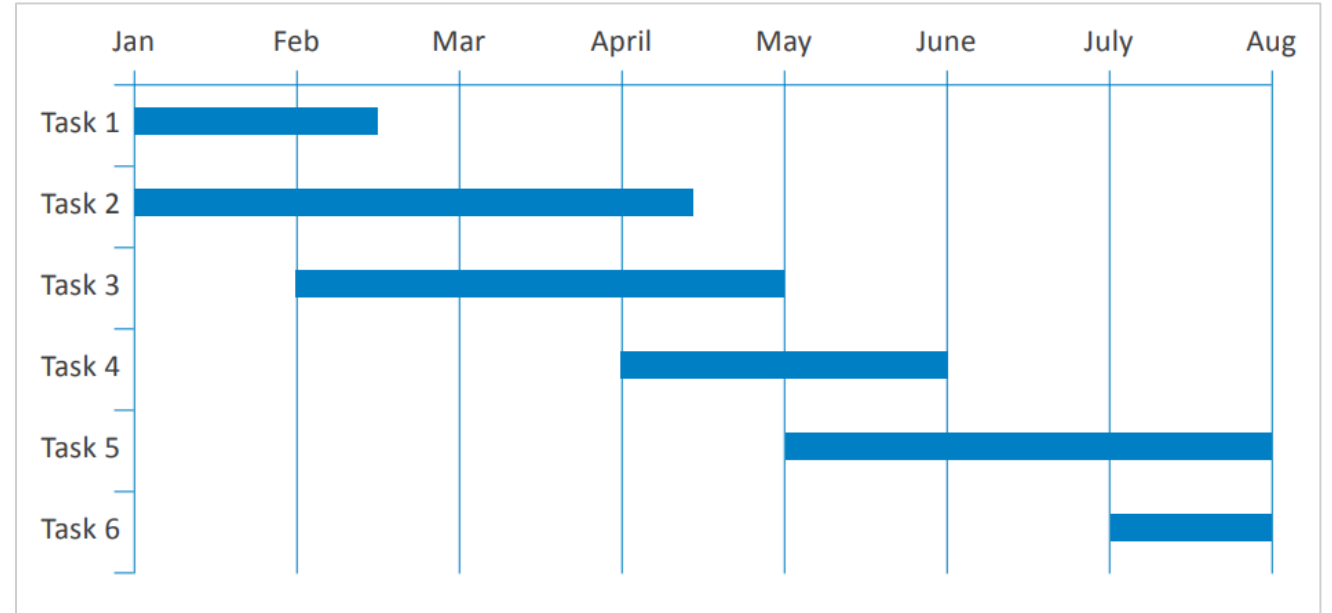
➤ p.45 of Module 3

Risk	Possible	Risk Level	Mitigation Method
Low customer numbers	Loss of sales and profits	High	Multifaceted marketing plan
High employee turnover	High marketing costs	Medium	Employee satisfaction committee
Accident – customer injury	Profits, goodwill	Low	Safe practices – insurance
Accident – employee injury	Profits, employee loyalty	Low	Safe practices – insurance



# When?

- Recognition that you don't have a crystal ball... but you need to have plans that have been developed based on evidence
- 3 / 5 / 10 year plan
- Year 1 / 2 / 3, or 2025-2028
- Phasing
- Project planning and milestones
- Gantt chart: p.34 of Module 2



Stage	Weeks	Period	2024	2025				2026				2027				2028				2029			
			Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
SLF bid and funding	17	Nov-2024	Feb-2025																				
Purchase St Monans	31	Mar-2025	Sep-2025																				
Appoint Development Officer	61	Mar-2025	Apr-2026																				
Apply for funding for urgent works - Landfill, HES	18	May-2025	Sep-2025																				
Urgent works	26	Oct-2025	Mar-2026																				
Meanwhile uses	22	Apr-2027	Sep-2027																				
NLHF Stage 1 application and process	22	May-2025	Sep-2025																				
NLHF Development Phase																							
Design team procurement	13	Sep-2025	Nov-2025																				
RIBA stage 3	13	Jan-2026	Mar-2026																				
Planning	17	Mar-2026	Jun-2026																				
NLHF Stage 2 application and process	26	Jul-2026	Dec-2026																				
RIBA stage 4	17	Feb-2027	May-2027																				
Build warrant	13	Jun-2027	Aug-2027																				
Contractor Appointment	13	Jun-2027	Sep-2027																				
On-site works	44	Nov-2027	Aug-2028																				
Fittings and refurbish	13	Sep-2028	Dec-2028																				
Completion and reopening		Jan-29																					



# Top tips



Who will do it and by when – identify responsibilities



Ask yourself throughout – ‘is there evidence to back this up?’



Assistance from outside – e.g. DTAS / COSS / TSI / Business gateway



Use appendices to make the main report readable



Avoid jargon



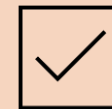
Source info and data e.g. government studies, reports



Use colour, graphs and images to make it interesting



Have an executive summary



Have a ‘critical friend’ read it over



# Examples of Business Plans (in the public domain)

- Whalsay Kirk: [Whalsay Kirk Development](#)
- Business Plan (2023): [Whalsay+Kirk+Building+Business+Plan+v1.pdf](#)
- St Monans Auld Kirk Enterprise: [St Monans Auld Kirk Home - St Monans Auld Kirk](#)
- Business Plan (2024): [24-12-03-Business-Plan-St-Monans-FINAL-version.pdf](#)
- St Oswalds Centre: [St. Oswald's Centre – Bringing new life to an old building](#)
- Business Plan (2020): [business-plan](#)



# Past papers – check your work!

- See p.6 of Module 4, 'Where asset transfer projects go wrong or experience difficulties'
- Websites / [OSCR](#) / [Companies House](#)
- [Kilmarnock Old Kirk | Community Venue](#)
  - In community ownership since 2017
  - [OSCR profile](#)
- [Kirkcaldy Old Kirk Trust](#)
  - In community ownership since 2011
  - [Companies House profile](#)
  - [OSCR profile](#)





# Resources

- [Your Church Your Community](#)
  - [2-COSS-Module-2-Feasibility.pdf](#)
  - [3-COSS-Module-3-Business-Planning.pdf](#)
  - [4-COSS-Module-4-Financial-Planning.pdf](#)
  - [5-COSS-Module-5-Governance-and-People.pdf](#)
  - [6-COSS-Module-6-Asset-Management\\_0.pdf](#)
- 
- [Tool for mapping the business model of your non-profit organization or social enterprise | Marcus Coetzee](#)
  - [Framework for writing a strategic plan for a charity or social enterprise | Marcus Coetzee](#)





- 
- HEALTHY HAPPY HUNTLY**
- SPORT**
    - Ball Sports
      - Cricket
      - Rugby
      - Football
      - Tennis
      - Volleyball
      - Basketball
      - Hockey
    - Non-Ball Sports
      - Cycling
      - Riding
      - Badminton
      - Skiing
      - Hill-walking
      - Ramblers
      - Climbing
      - Fishing
  - BUSINESS**
    - Retail
    - Professional
    - Hospitality
    - Food
    - Agriculture
    - Non-food
    - Manufacturing
    - Business Gateway
    - HBA
    - Campaigning
    - Promotion
    - Co-operation
    - Support
    - Visitors
  - VISITORS**
    - Promotion
    - Welcome
    - Attractions
  - PUBLIC SERVICES**
    - Housing
    - Social Work
    - Family Resource Centre
    - NHS
    - Jubilee Hospital - Medical Centre
    - Dentists
    - Mental Health Association
    - Huntly Learning Centre
    - Lirien Centre
    - Gordon Primary
    - Grampian Police
  - PHYSICAL ASSETS**
    - Intangible Assets
      - Culture
      - Identity
      - History
    - Physical Assets
      - Natural Built
        - Rivers
        - Wildlife
        - Hills
        - Forests
      - Historic Built
        - Castle
        - Towncentre
        - School
      - New Design
        - Location



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<https://dtascommunityownership.org.uk/>

BlueSky - [DTAScotland](#) / [Community Ownership Support Service](#) / [Democratic Finance Scotland](#)

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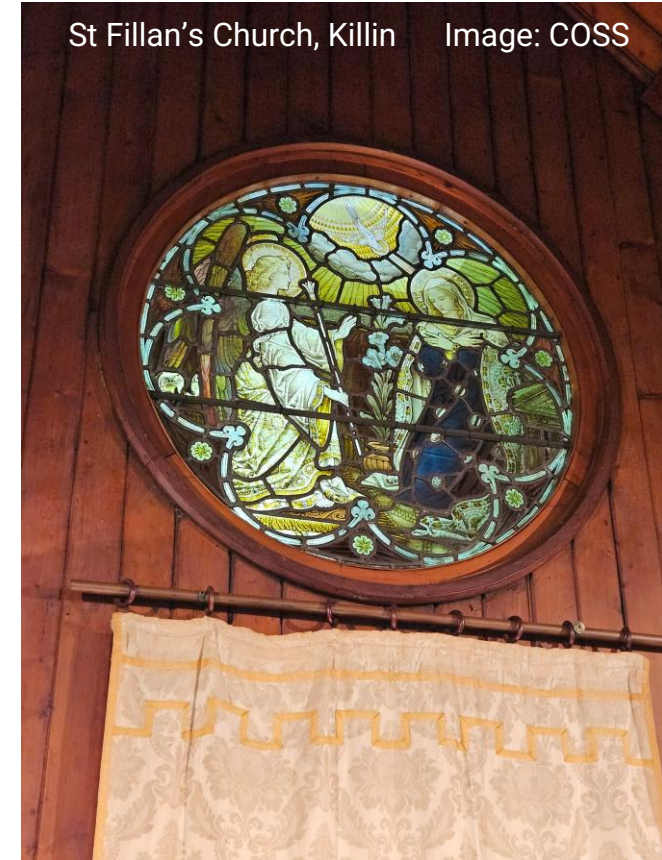
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