

New Futures: Former Places of Worship Workshop Series 2

Business Planning



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

- A three-year programme (January 2025 – December 2027)
- Part of the [Community Ownership Support Service](#), within [Development Trusts Association Scotland](#)
- Funded by National Lottery Heritage Fund (NLHF), Historic Environment Scotland (HES) and Development Trusts Association Scotland (DTAS)
- To provide enhanced support to community groups considering taking on a former place of worship (typically a church) across Scotland
- In direct response to the significant and unprecedented number of former places of worship that are due for disposal over the next several years



HISTORIC
ENVIRONMENT
SCOTLAND

ÀRAINNEACHD
EACHDRAIDHEIL
ALBA



Development
Trusts Association
Scotland

A Thriving Community-led Network



Who delivers the programme, and what does it offer?

- Staffing: three Churches Advisors and a Churches Programme Officer



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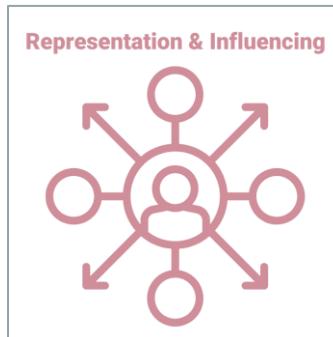


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Current workshop programme

- Rolling programme of 8 workshops
- Two remaining in this block:
 - [Financial Planning](#)
 - Thursday 12th February 2026
 - [Community Right to Buy](#)
 - Tuesday 3rd March 2026
- Next round from April onwards
- Plus standalone online workshops – let us know if there is a topic you would like to see covered

Rolling Workshop Programme

Follow the QR code below for more information, and to sign up to our rolling workshop programme.

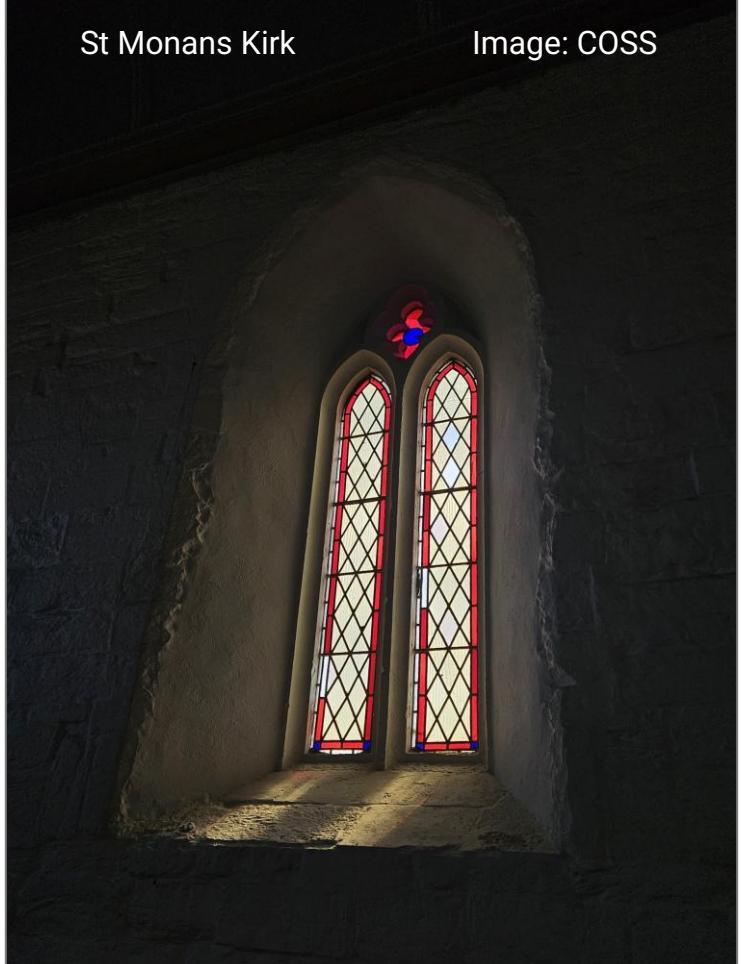
1. First Steps to Community Ownership
2. Involving Your Community
3. Finance and Fundraising 1: Grant Funding
4. Finance and Fundraising 2: Other Funding Methods
5. Your Building: A Guide
6. Business Planning
7. Financial Planning
8. Community Right to Buy





Today's workshop: Business Planning

- Presentation from Claire Martin, Churches Advisor, Central and 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
 - We're planning on recording the session, so please turn your camera off if you don't want to be recorded
- Follow up:
 - We will send the slides out by email after the event
 - Feedback forms
 - Get in touch! With us – and each other (via us if you'd prefer)



St Monans Kirk

Image: COSS



Today's workshop: Business Planning



Dreet Halls, Anstruther

Image: COSS

Overview:

- What is a business plan for?
- The difference between a feasibility study and business plan
- Commissioning support
- Content of a business plan – an outline
- Marketing
- Governance & planning
- Top tips
- Sources of support

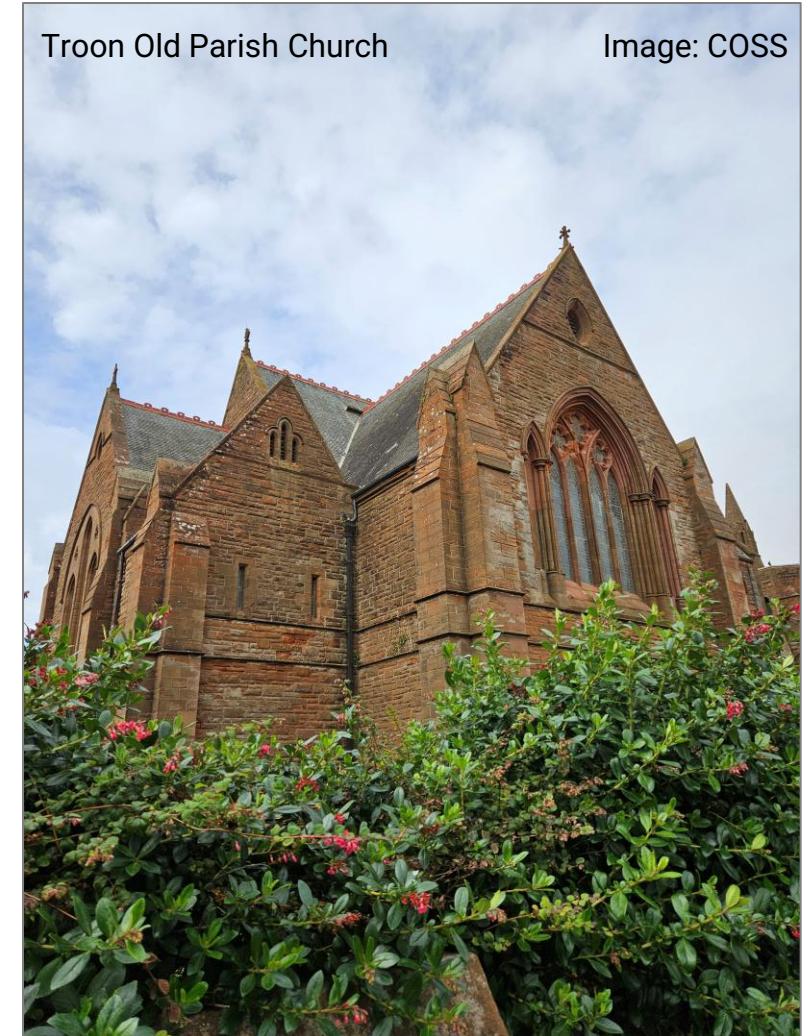


What (and who) is our Business Plan for?

- 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

Troon Old Parish Church

Image: COSS





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:

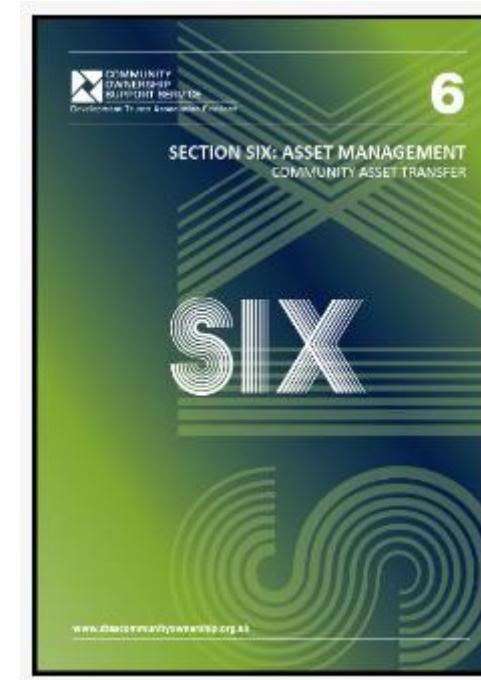
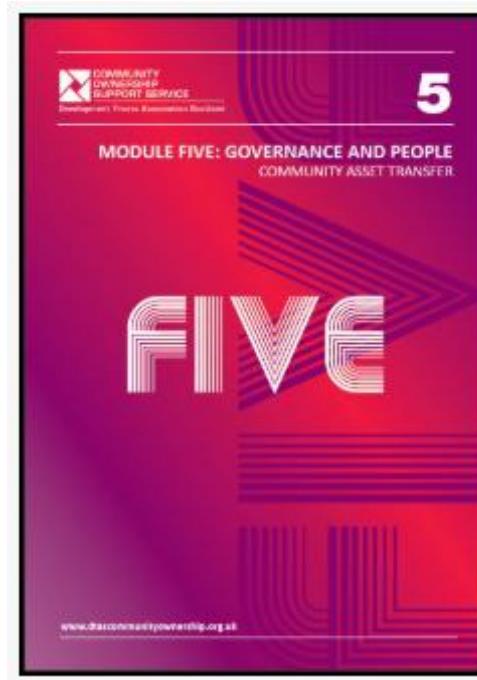
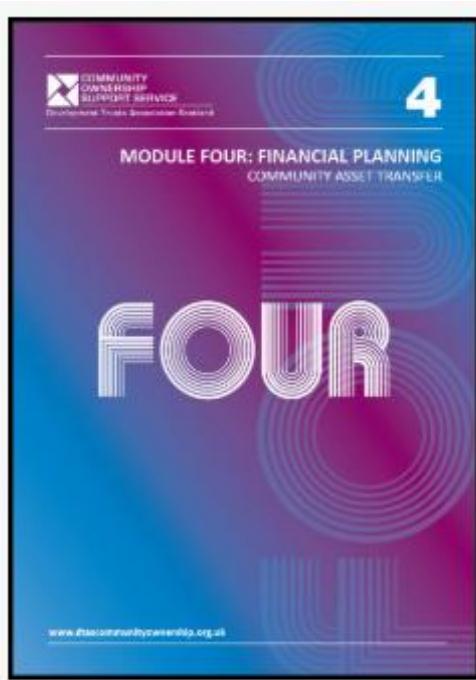
- Setting out the delivery of the project
- 'Investment ready' / 'operational'
- It is never a static document – it should be designed to evolve
- COSS resource: [3-COSS-Module-3-Business-Planning.pdf](#)





Other COSS resources

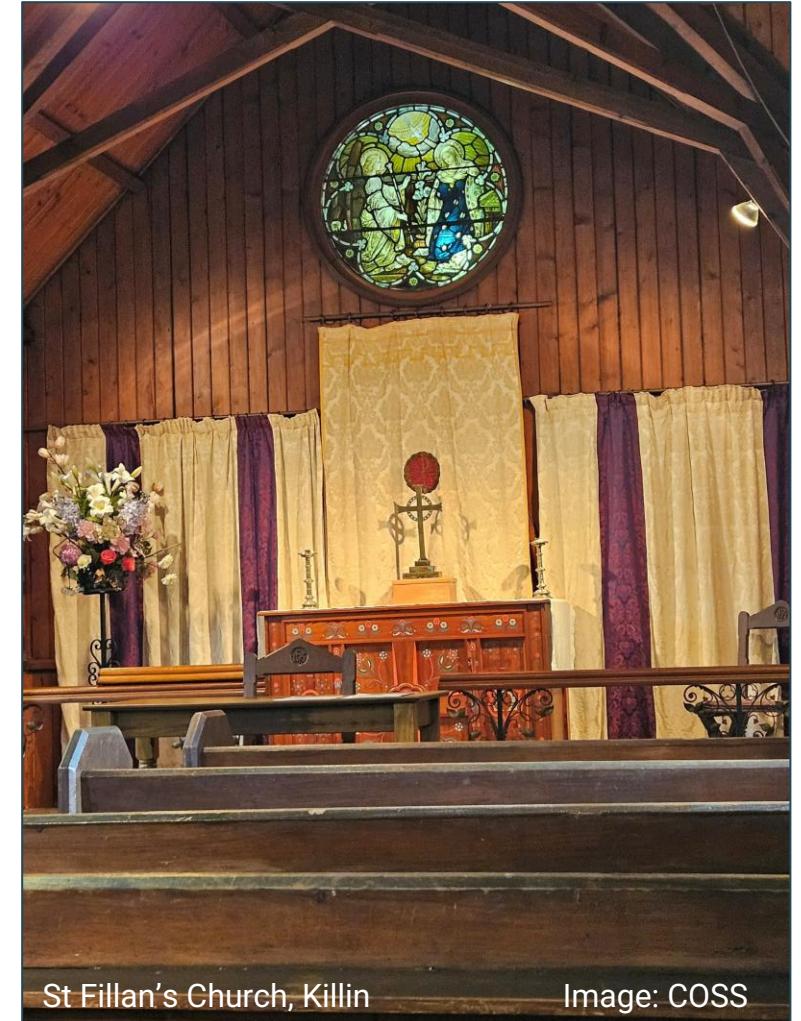
- Financial Planning: [4-COSS-Module-4-Financial-Planning.pdf](#)
- Governance and People: [5-COSS-Module-5-Governance-and-People.pdf](#)
- Asset Management: [6-COSS-Module-6-Asset-Management_0.pdf](#)





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 you are confident that you can deliver it





Buying in (commissioning) support

- Step 4 of [Ten Steps to Community Ownership](#)
 - Guidance note
 - Templates for a brief / contract for consultants

TEN STEPS TO COMMUNITY OWNERSHIP

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.

WORKING WITH EXTERNAL HELP



Buying in (commissioning) support

- Funding:
 - [Beyond The Usual Suspects](#)
- Crowd funders:
 - [Elie Kirk](#)
 - [Crail Kirk](#)
- 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



Funded by
Scottish Government
Riaghaltas na h-Alba
gov.scot

AHF Transforming
Heritage



Buying in (commissioning) support

Project Viability Grants

Up to **£15,000**. No match funding required.
Monthly application and decision cycle.

Help to answer some key questions:

- Should we take on this building – or not?
- What would it cost to buy it? (*Valuation*)
- What would we use it for if we owned it? (*Options Appraisal*)
- What changes would we need to make? (*Architect*)
- What would it cost to make the changes? (*Quantity Surveyor*)
- How will we make money to pay to run it? (*Business Plan*)
- How should we organise ourselves? (*Governance*)
- *Plus a small additional fund:*
WGF TSF – Allows for Emergency Works – up to £15,000





What should our Business Plan sound like?

- Write it in your own style
- [Plain English free guides](#)
- Example from [Solas Eige](#)

OUR VISION AND MISSION

Solas Eige is Scottish Gaelic for "Light of Eigg". This name was chosen to express our 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 to bring the building and the land back to life and become "*Ionad Solas Eige*" - the Solas Eige centre.**

First of all, we need to make the church fit for purpose by stopping water coming through the roof and insulating it as well as dealing with rising damp. We also need to bring in water and toilet facilities and install heating compatible with our island's renewable electricity system. This is Phase 1.

Once the church is repaired, we can then transform it into ***Ionad Solas Eige* - the Solas Eige centre - to "showcase our community's past whilst looking to our future,"** and create a hub for new activities that will inform, involve and inspire. This is Phase 2.



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
- [Crail Community Hall](#)
- [Bedrule Church Future](#)



*Crail
Community
Hall*

3.1 Strategic Aims and Objectives

Crail Community Partnership (CCP) is leading the redevelopment of the community hall. Our objective is to take forward the actions of the Local Place Plan through a 'whole-town' approach to placemaking encompassing not only the built and natural environment but also community empowerment and service delivery.

Our vision for the hall is

'a place owned and managed by and for the community where people of all ages and from all parts of the town can come together to help build a re-energised community'

Extract from Crail Community Hall Business Plan



Image: COSS

The potential

Bedrule is a scenic and cultural focal point in Rulewater: the front door view towards Ruberslaw and the Rule Valley places Bedrule church in extraordinary relationship with a beautiful landscape loved by locals and visitors alike. The building is a familiar presence for those who live and work here, and a destination of interest to visitors with ancestral ties or who are drawn to this special part of the world.

This is a space that holds our past, present and future. Building on its rich history, we aim for this to remain a community resource relevant to contemporary needs. By providing more people with access and meaningful connection to this area, and by providing a space for our community to hold ceremony and celebrate life's milestones, we hope that Bedrule church will remain the cornerstone of Rulewater long into the future.

Screenshot from website



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 km²). 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 island's community with the mainland via Laxo. The crossing takes approximately 30 minutes.

There are a little over 1,100 residents on the island 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.

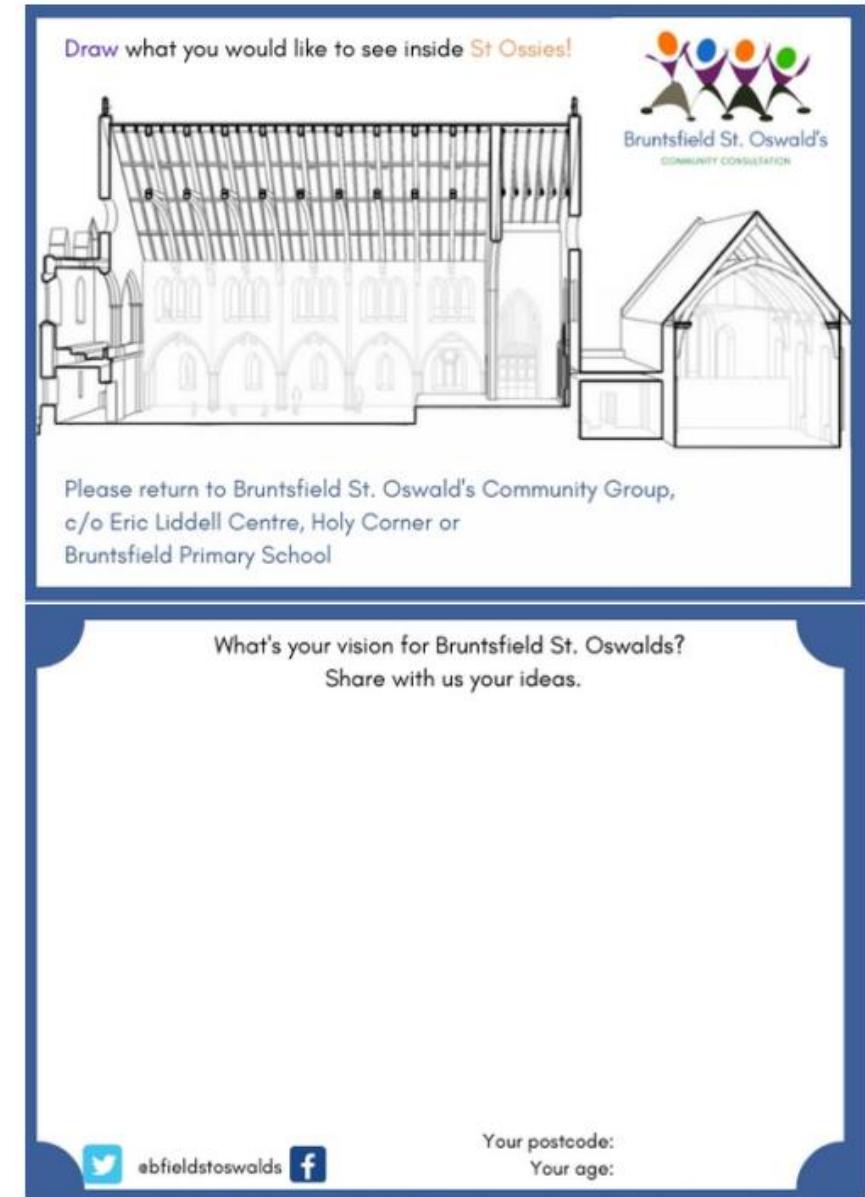


Extract from Whalsay Kirk Business Plan



Who? The community (overview)

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



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 Greenhields 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 1992 and windows by Douglas Strachan 1922. Memorial with interesting link to wartime Enigma decoding project. A copy of the Church Recorders 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 ÁRAINNEACHÓ EACHDRAIDHEAL 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

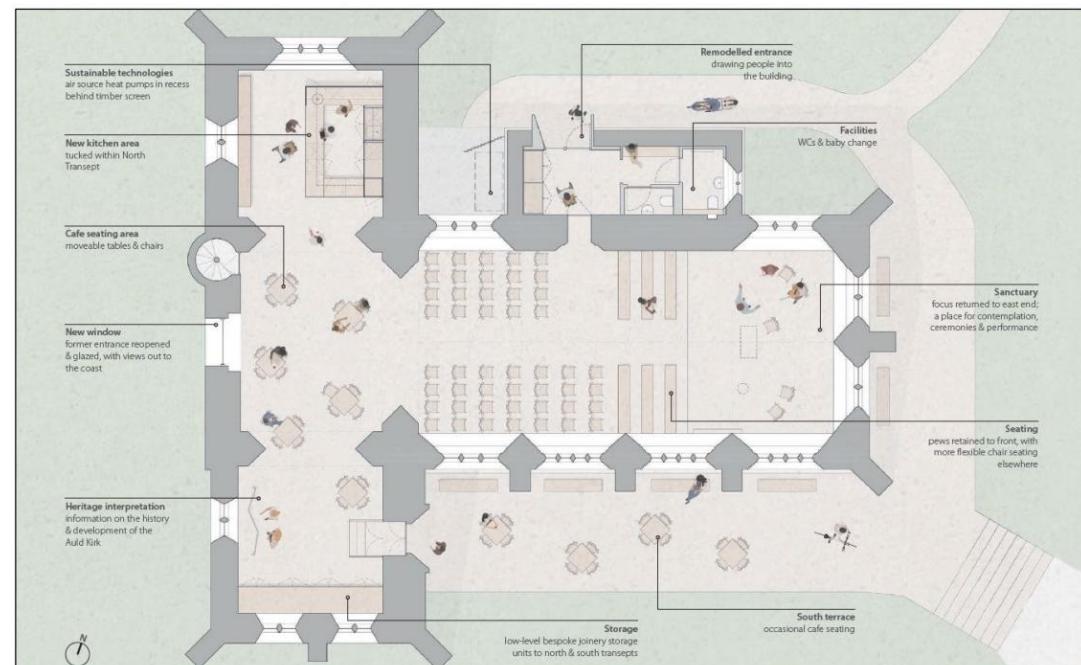
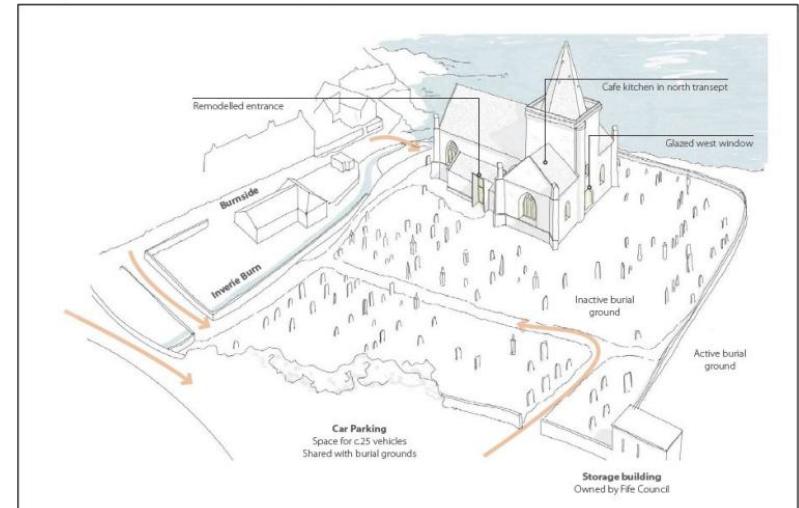
Summary

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

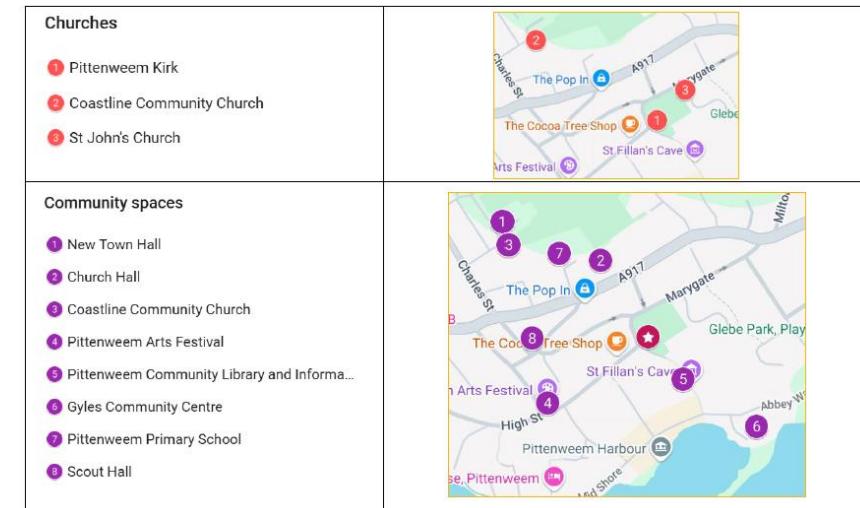


Where? Asset mapping

- The church building in the context of the community



Asset	Description / facilities	Partnership opportunities / risk of displacement
New Town Hall 	<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) Fully furnished kitchen Stage area with pull down screen On-site parking (60 vehicles) Disabled accessible toilets Sound system Internet access</p>	<p>Buildings are dated / not used to capacity – listings for February 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 Facebook (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>
Church Hall 	<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>



Extracts from Pittenweem Church Feasibility Study



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	Secondary research
<ul style="list-style-type: none">• 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	<ul style="list-style-type: none">• 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? 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: [Crail Community Hall](#)
- Examples: [Hymhus](#)

Important Dates

28/2 & 21/3 – 7.30 pm
Quiz Nights

13 February – 7.30 pm
Silent Movie: R.E.M. & Buster Keaton's Sherlock Jr (Comedy)

22 February – 3.00 pm
Family Fun Rocky Retro Concert with The Bad Eggs

4 March – 7.00 pm
National Theatre Live—The Audience with Helen Mirren

6 March – 7.30 pm
Storytelling Evening with Riikka Palonen

14 March – 7.30 pm
West Life—Live on Stage Screening

15 March – 3 pm
Flamenco Experience/Spanish Afternoon

Regular Events

Mondays—10-11am & 6-7 pm
Qigong Classes with Kate Miller

Tuesdays - 9.15
Yoga Classes with Anthea Gardiner

Tuesdays - 17.00
Barre Class with Alice Mooney

Tuesdays - 18.15–19.45
Crail Table Tennis & Youth Club

Tuesdays - 19.00
Badminton until 31/3/26

Wednesdays - 9.15, 10.30, 11.45
Pilates with Judy Drew

Wednesdays—14.00 - 16.00
Pickleball until 29/4/26

2nd and 4th Thursday - 20.00
Folk Club

Fridays lunch club every two weeks 11.30 - 13.30
Re-started 16/1/26

Hymhus Headliners

Our concert programme featuring a diverse range of headline acts. Keep an eye out for the latest events on our events and news feed.

Poems and Pieces

A lunchtime celebration of local words and verse with filled rolls, hot drinks and good cheer.

Short and Sweet

Short (20 - 25 min) family-friendly performances which follow the Sunday Star walk when the bell rings at 11am. We currently put out a buskers hat for performers. Please get in touch with jonathan@bigtoncollective.org if you are a performer interested in doing a Short and Sweet slot!

Listening Parties

Friday evening relaxation - album starts at 6pm. With tab nabs and a refreshing mocktail. More info [here](#).

About Our Events

Our events programme is seasonal and culminates every summer with our [Community Exhibition](#) based on a shared theme: 2021 Bigton and Birds, 2022 Water Works, 2023 Waddered and 2024 Under the Surface.

At Hymhus we work with many other organisations, performers and practitioners who are aligned with our aims.

Some examples of past collaborators include [Shetland Resolve](#), [Yann & Emilie Tierson](#), [Jenny Sturgeon](#), [NHS Shetland Speech and Language Department](#), [Shetland Arts](#), [Kate Molleson](#), [Shetland Folk Festival](#), [Chroma Ensemble](#), [Ragged Wood Promotions](#), [Adult Learning Shetland](#) & [HIE](#).

For larger events (weddings, conferences etc.) we work closely with the Bigton Community Hall and can provide facilities across both buildings.

We are led by our Bigton Collective [values](#), prioritise local interests and take a proactive and positive attitude towards making things happen!

Refreshments

All our events are alcohol free. We take pride in Hymhus being a welcoming place where people can feel as safe and relaxed as possible.

We have a fabulous selection of hot and cold drinks with snacks available.



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?	Women and young girls aged 14 upwards Café – centre users Training and education – unemployed local women Counselling – women with mental health issues, victims of domestic violence Childcare business – local mothers and fathers Outside catering – community groups and businesses Office rental – local businesses / social enterprises
How many users are there at present?	Childcare – 30 per annum (at capacity – crèche only linked with education) 30 customers per day at internal café , (£120 per day turnover) 300 women on courses in training and education per annum 300 women in counselling per annum No current users for office rental
Demand	178 enquiries for childcare in 2016 78 outside catering requests in 2016 Waiting list of 127 women for training and education Waiting list of 116 for counselling In relation to office rental 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 outside catering, but three private sector operators in the area – opportunity to attract customers with the #buysocial strapline</p> <p>No other childcare facility within a three mile radius</p> <p>Enterprise agencies and private landlords are offering office accommodation but most of their offices are large</p>
What are the strengths of other providers competitors/ collaborators?	<p>Training and education – some providers in the market. Good quality but no female only provision</p> <p>Outside catering – some providers. All are expensive, all have good staff</p> <p>Childcare – strong provider but not planning to expand</p> <p>Counselling – 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>Office rental – 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>Childcare – all at capacity</p> <p>Training and education – all local providers are at capacity and don't cater for the women only space</p> <p>Counselling – everyone is at capacity in relation to counselling based on funding cuts</p> <p>Outside catering – 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? Marketing

➤ p.34 of Module 3

Promotion	Advertising	Sales promotion	Public relations	Personal selling
Traditional	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
Digital	Online ads, e.g. <ul style="list-style-type: none">• Pay per click• Pop up• Google ads• Banners• Facebook ads 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">• Facebook• Twitter• LinkedIn 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!



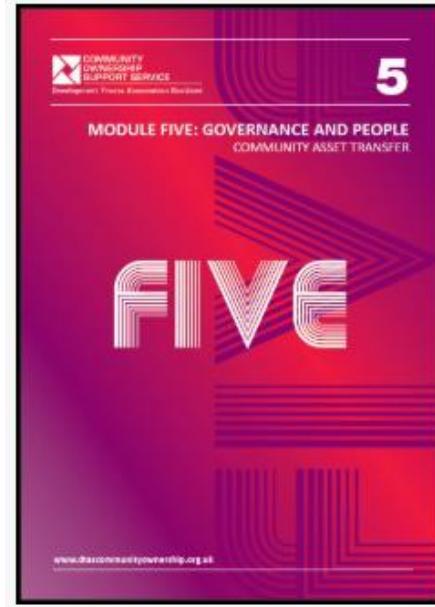
So it's taking us a little bit longer than we'd hoped to issue share certificates. Please bear with us... we hope to issue the majority by end of July.





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

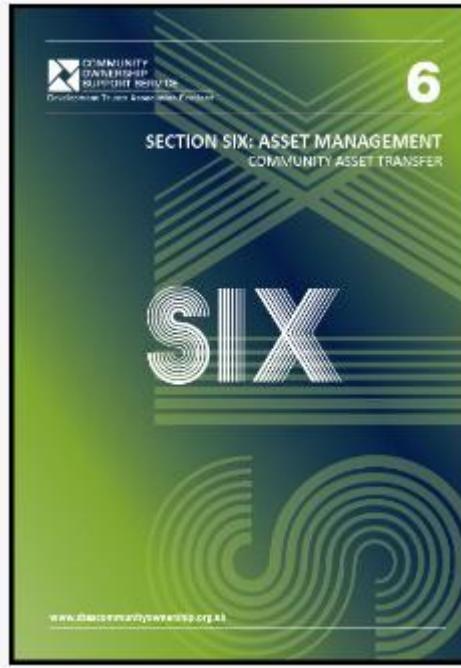
- The Board is relatively large with 12 trustees. A skills audit was undertaken in early 2023 and though skilled in many areas, topics for development were identified as 'digital and information technology', 'evaluation work' and 'finance and fundraising'. These will need to be a focus going forwards.
- 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	<p>Property policies – who may rent or use an asset and on what terms</p> <p>Strategic asset management – how the asset delivers against key objectives</p> <p>Capital management – managing the investment in the property</p> <p>Corporate landlord responsibilities – insurance, statutory compliances</p> <p>Business risks and continuity – making sure the bills are paid and that the land/building remains usable</p>
Site Maintenance and Management	<p>Assign an officer in charge of/responsible for key functions of:</p> <ul style="list-style-type: none">• Fire prevention and health and safety• Grounds maintenance• Security• Health and safety compliance• Parking
Building Maintenance	<p>Repairs and planning upgrades</p> <p>Cyclical and preventive maintenance</p>
Contractor/Staff/Volunteer Management	<p>Negotiating contracts with sub-contractors</p> <p>Management of services provided by staff, volunteers and third parties in respect of:</p> <ul style="list-style-type: none">• Cleaning• Catering• Grounds maintenance• Security• Repairs

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

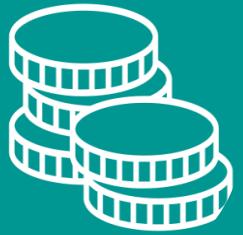


How? Financials



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

- **Expenditure**
- p. 9 of Module 2
- p.7-17 of Module 4 for detailed breakdown of expenditure for an asset
- **Capital costs**
 - Purchase price
 - Costs associated with purchase (e.g. legal fees, LBTT if over £150k)
 - Renovation (VAT considerations)
- **Revenue, including**
 - Heat and light
 - Insurance
 - Volunteer costs
 - Staffing costs – salary, pension, National Insurance

- **Income**
- Grants
- Operational income

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? 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

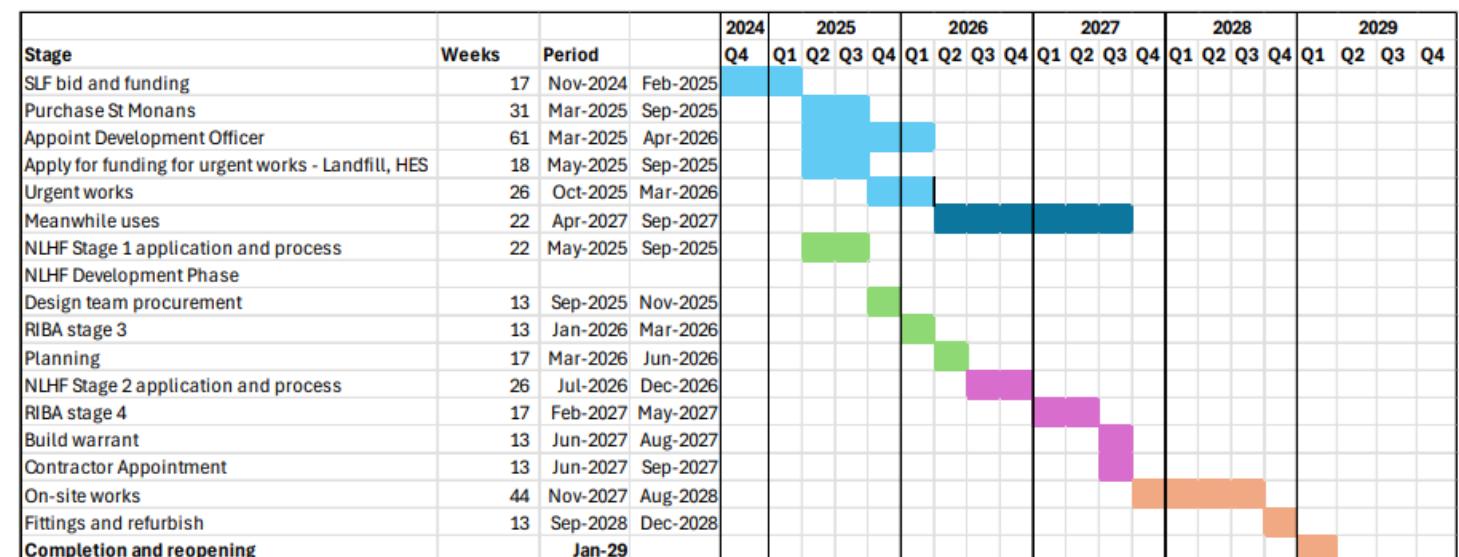
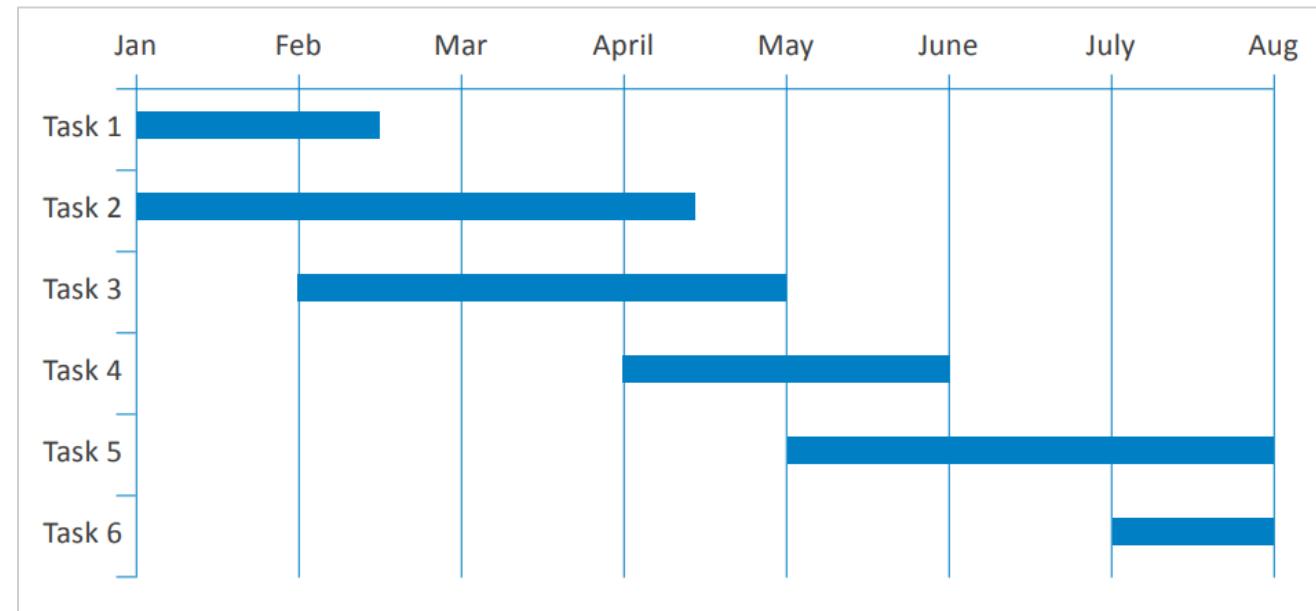
- p.45 of Module 2
- p.45 of Module 3

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



Extract from St Monans Auld Kirk Business Plan



Top tips

<input checked="" type="checkbox"/>	Who will do it and by when – identify responsibilities	<input checked="" type="checkbox"/>	Ask yourself throughout – ‘is there evidence to back this up?’	<input checked="" type="checkbox"/>	Assistance from outside – e.g. DTAS / COSS / TSI / Business gateway
<input checked="" type="checkbox"/>	Use appendices to make the main report readable	<input checked="" type="checkbox"/>	Avoid jargon	<input checked="" type="checkbox"/>	Source info and data e.g. government studies, reports
<input checked="" type="checkbox"/>	Use colour, graphs and images to make it interesting	<input checked="" type="checkbox"/>	Have an executive summary	<input checked="" type="checkbox"/>	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 Business Plan](#)
- St Monans Auld Kirk Enterprise: [St Monans Auld Kirk Enterprise](#)
- Business Plan (2024): [St Monans Auld Kirk Business Plan](#)
- St Oswald's Centre: [St Oswald's Centre](#)
- Business Plan (2020): [St Oswald's Centre Business Plan](#)
- Crail Community Partnership: [Crail Community Partnership](#)
- Business Plan (2020): [Crail Community Hall Business Plan](#)



Learning from the experience of others

- 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](#)



St Monans Kirk

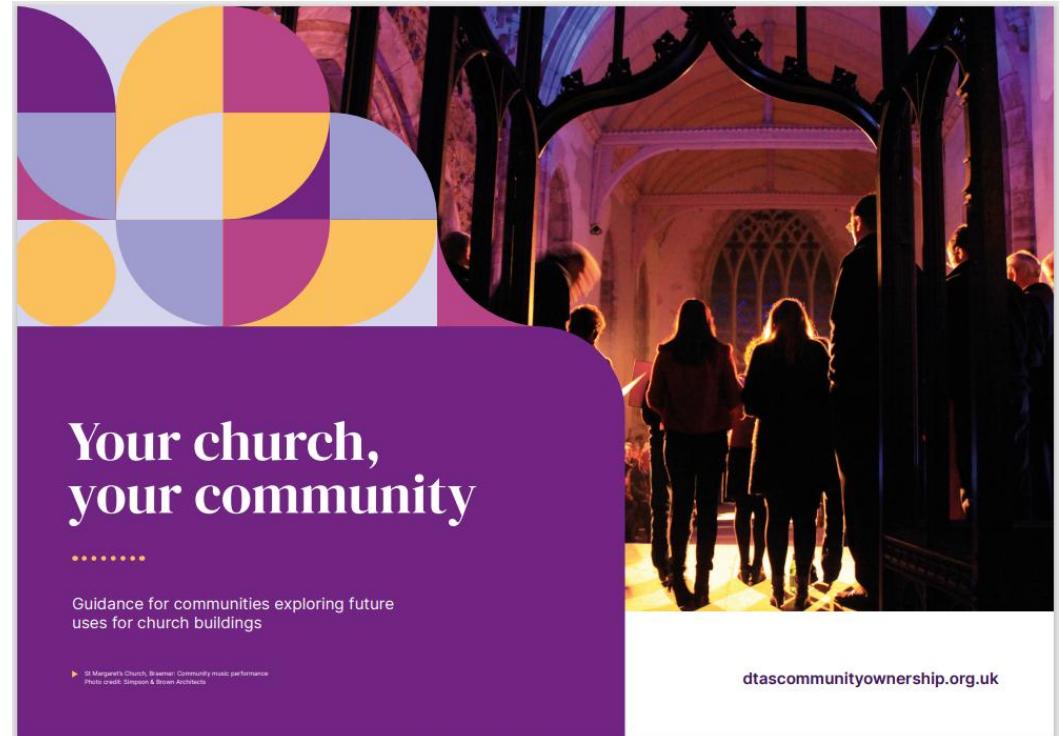
Image: COSS



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](#)





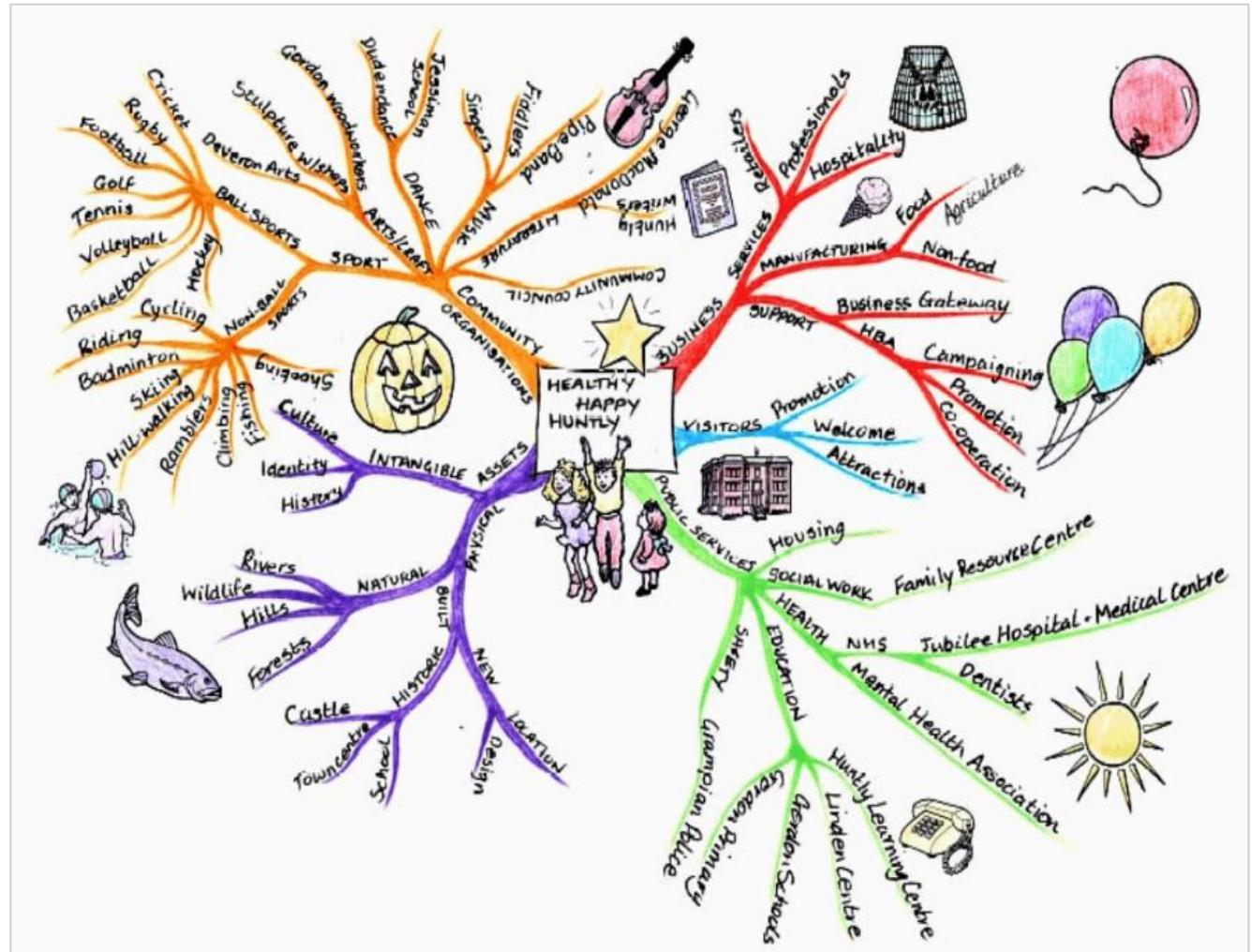
Resources

- [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](#)
- [Greening ChurchBuildings](#), guidance produced by [Eco Congregation Scotland](#)
- [Maintenance Co-operatives Resources](#), guidance produced by [The Society for the Protection of Ancient Buildings](#)
- [Facilities Management - Managing the building works](#), guidance produced by the Church of England



Final thoughts

- Can you draw it?
- Can you summarise it into one side of A4? See p.17 of Module 3 for a Business Model Canvas
- Would a 12 year old understand it?





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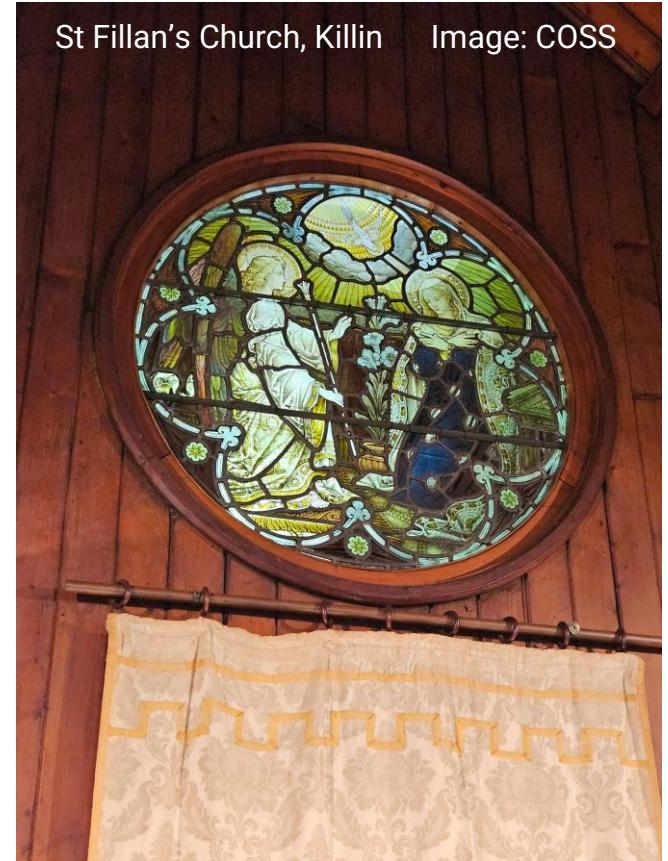
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St Fillan's Church, Killin Image: COSS





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