



# STRATEGIC PLAN

## 2004 – 2007

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# BIRSE COMMUNITY TRUST

## STRATEGIC OVERVIEW

*'to promote the common good of the inhabitants of the parish of Birse and deliver wider public benefits'*

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### Long Term Vision

To have in place a wide range of projects, which between them, will provide tangible benefits to all Birse residents and the wider public, supported by a stable, largely self generated financing structure.

### General Objectives

1. Maintain and develop BCT as an organisation which is based on open-ness, mutual trust and respect and enthusiasm.
2. Support and promote the work of individuals and groups concerned with the conservation and understanding of the natural and cultural heritage in Birse parish.

### Financial Objectives

1. Meet all core costs from self generated funds and build up a reserve of £15,000 of uncommitted funds by developing existing sources of revenue and seeking new ones.
2. Maintain a tight control on all costs, supported by further development of a transparent, easily maintained reporting system.
3. Ensure that as much as practical of BCT's income is spent within the parish of Birse

### Projects

#### Land and Buildings

1. To continue the development of the Old School complex as a community resource and a source of core funding revenue.
2. Ensure the care and maintenance, to the highest possible standards, of buildings and land owned and managed by BCT, and support their use by local community groups.
3. Promote and support the work of the Natural Heritage Group, and increase local awareness of the group and its activities.
4. Respond positively to opportunities to acquire further properties which are of benefit to the local and wider community and where BCT can provide a unique role and service through its ownership.

## **Forests and Woodlands**

Develop and expand BCT's role in the management and ownership of forestry projects with an emphasis on sustainable environmental development and greater appreciation and enjoyment by the local and wider community.

## **Mills**

Develop and implement a management plan for the Finzean water mills which ensures their conservation, continued operation and educational use in ways that benefit the local community and deliver wider public benefits consistent with their national historical significance.

## **Archives**

Continue to expand the archive, and increase awareness and use of it by both the local and the wider community.

## **Community**

1. Increase awareness of the relevance of BCT's activities to individuals within the Birse parish community.
2. Initiate and respond positively to demand for self-funding activities, which are of benefit to the Parish.
3. Maintain a positive and co-operative engagement with other local community organisations.

## **BCT Reputation**

Maintain and enhance BCT's reputation within the wider community as an efficient, exciting and innovative Rural Partnership with an exceptionally high level of community involvement.

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*Jim Gordon (Chair)*

Dated

*Guy Haslam (Vice Chair)*

*Lynne Gordon*

*Neil MacConnach*

*Fiona MacKenzie*

## **2. Area**

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1. The civil parish of Birse covers 50 square miles (125 sq.kms) in Mid Deeside and is one of the largest parishes in Aberdeenshire.
2. The parish has four main parts which form the basis of BCT's logo: the three scattered rural communities of Finzean, Ballogie and Birse and the largely uninhabited Forest of Birse covering over a quarter of the parish's total area.
3. The parish has a population of approximately approximately 730 people living in 260 households, with half the population and households in Finzean and the other half divided between Ballogie and Birse.

## **3. BCT Membership**

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1. BCT is a community business owned by the residents of Birse. Everyone on the Electoral Registers for Finzean, Ballogie & Birse (approximately 560 electors) is a member of the Trust. These members elect the Trustees to run BCT on behalf of the local community.
2. BCT welcomes and encourages those with an interest in the work of the Trust to become Associate Members.

## **4. Charitable Company**

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1. BCT was incorporated as a company in August 1998 and became fully operational with its inaugural Annual General Meeting in February 1999.
2. BCT is a company limited by guarantee and a recognised Scottish charity, with its objects, powers and duties set out in its Memorandum and Articles of Association.
3. BCT is constituted as a company to provide a robust legal and financial arrangement for undertaking projects on behalf of the local community.
4. BCT was established as a community business to help overcome the inherent limits to local voluntary effort within a relatively small community that is already very active supporting community associations, village halls, churches, the school and other local groups and clubs.

## **5. BCT Strategic Plans**

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1. By its establishment in 1999, BCT was committed to managing six site based projects, each addressing a local community issue. These initial projects and others that have been taken on since have meant that BCT has had to grow and develop very rapidly during its first five years.
2. The first two years covered by BCT's first strategic plan and have been characterised as the 'establishment phase'. The Trust evolved procedures to cope with the large portfolio and methods of consultation with partners.
3. BCT's second plan 2001-2004 Plan was seen as a 'consolidation phase' during which the central aim was to ensure that BCT and all its projects are managed to appropriately high standards.
4. This third Plan covers the three years from April 2004 to March 2007 and can be considered a 'development phase'. During this period BCT will pursue sustainable objectives, whilst striving to adhere to 'best practice' principles, and give 'best value' possible.
5. In line with the two previous plans the overall objective is "to promote the common good of the inhabitants of Birse parish and deliver wider public benefits".
6. The Plan encompasses BCT's existing and proposed projects, together with all the main aspects of the management of BCT as a community business accountable to its local membership.

7. BCT's projects are of two main types, site based and area wide projects. While the main aspects of BCT's operation is the business management, the open-ness & accountability of its administration and the role of community participation and other partnerships play an import role in the operation of the Trust.

## **6. ACCOUNTABILITY**

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The Trustees are accountable to the residents of the parish of Birse who own the Trust and who elect the Trustees, to ensure the proper management of BCT on their behalf. The Trustees bear the ultimate responsibility that the Trust is managed in an open and transparent manner and in accordance with its polices and legal obligations which are reviewed on a regular basis. Any member of the Trust is able to attend any board meeting and inspect BCT's files.

## **7. MANAGEMENT**

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BCT was set up as a local community business to provide the inhabitants of Birse extra facilities to carry out projects on behalf of the community. BCT's aim is to be an efficient, viable community business, working within the agreed objectives and strategies and legal obligations.

## **8. FINANCIAL MANAGEMENT**

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Grants, donations and sales are BCT's three main sources of income. The main aim over the next three years is to increase the average annual income from self-generated income, while maintaining the current level of annual grant income. In the past 5 years BCT has attracted more than £600,000 into the parish, over 50% was spent in the local community and over 75% was spent in the surrounding area.

### **Key targets:**

1. To retain sufficient a level of funds to offset any impact from variations of grant income on the Trusts level of activity. A contingency fund of £15,000 will enable the Trust to cope with fluctuations in income and expenditure.
2. To ensure that main projects and programmes continue to be self financing.
3. To develop BCT's earned income by seeking revenue generating projects and sourcing service agreements.
4. To maintain and improve on the current level of local employment provided by BCT and ensure a spread of these opportunities across the parish.

## **9. COMMUNITY PARTICIPATION**

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Everyone on the local electoral roll of the parish is automatically a member of the Trust, making BCT both inclusive and democratic. Currently BCT communicates and consults with the members with six monthly newsletters, the AGM, the Trustees Reception, and through Birse Parish Liason Group (BPLG) and the Natural Heritage Group, evening classes and courses local visits and meetings, mailings, and other events.

### **Key targets:**

1. To improve awareness and consultation with the members.
  - a. BCT will hold a series of open days to increase local awareness and give the community an opportunity to visit/revisit the projects to monitor progress. There is also an intention to hold a local produce market.

- b. BCT will conduct a social audit of BCT's performance in the community.
2. To identify community initiated projects, so that BCT provides more tangible benefits to inhabitants of the parish
3. To address local issues as they arise, subject to funding. These projects may be aimed at specific groups in the community (e.g. younger and older residents) and deal with specific topics (e.g. education, health and training).
4. To continue to develop an annual programme of training and educational events that involves members participating directly in practical work and/or learning skills.
5. To continue to build local opportunities for part-time work for BCT.

## **10. WIDER COMMUNITY PARTNERSHIPS**

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1. BCT will continue to develop its partnership with local representative bodies, the three community Associations and two community councils, and other local partners (e.g. the Church and local estates).
2. As a Local Rural Partnership, BCT will maintain and develop relations with the range of outside bodies and seek to establish contact with new organisations supporting community planning and local service delivery.
3. BCT will also aim to improve its networking within this sector with other local rural partnerships, other community development trusts and related groups, including the target of at least one exchange visit elsewhere per year by a group of BCT members.

## **11. NATURAL HERITAGE**

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Over the past three years, BCT has undertaken a wide range of projects which has significantly increased knowledge of the natural heritage of Birse. The baseline information gathered confirms the diversity and richness of the area in a regional and national context. There has been some community involvement in all the projects and the natural heritage programme is closely linked to some of BCT's other projects such as access and forest management. The close working relationship between BCT and the main land-owning estates in Birse parish has helped with the practicalities of survey planning and provides a good basis for information exchange on natural heritage topics. The results of the surveys to date are being compiled in a publication entitled Nature in Birse to be distributed in the community.

Funding for a further programme of the natural heritage work is currently being discussed. The emphasis of the new programme will shift from surveys and information gathering to community consultation and practical conservation projects.

### **Key targets:**

1. Consultation and planning. A key objective is to strengthen the community understanding and involvement on natural heritage matters in Birse. The main focus for this will be a community based consultation on biodiversity. The aim is to produce a Biodiversity Action Plan for Birse which is rooted in and supported by the community. A key factor in successful community engagement will be early delivery of some tangible action on the ground emerging directly from the consultation.
2. Practical conservation works. Various priorities for practical conservation work will emerge from the consultation and planning process. These are likely to range in scope from fairly modest to possibly quite substantial items. The most appropriate phasing and funding arrangements will depend on the specific circumstances. Some projects may be more appropriately covered by other grant schemes. Nevertheless some potentially valuable projects are expected to emerge which it would be appropriate to fund from the SNH budget.

3. Habitat and species survey. Further baseline data gathering through a range of habitat and species surveys is required to fill in some of the gaps in current knowledge. Whilst the focus will be on new work, in certain special cases (for example Capercaillie, Black Grouse and Water Voles) some continuation and/or development of existing work may be justified. Also further effort on data handling and interpretation is proposed with the aim of improved community involvement. The scope and number surveys will be agreed annually between SNH and BCT. Also, with the emphasis in this programme on community engagement and practical conservation, it may be agreed to divert funds from survey to biodiversity actions.

## 12. CULTURAL HERITAGE

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BCT has been involved in a wide range of cultural heritage projects since 1999. These projects include the conservation of important buildings in the parish, reprinting local history books, indexing parish records, collating and recording items for the Finzean Saw Mill complex and the Ballogie Souter's Shop, compiling the Book of Remembrance, local archaeology surveys, developing a local history archive, as well as researching local family history and buildings.

The former Soup Kitchen contains an environmentally controlled archive store, which is to be extended during 2004. New funding will also allow further cultural heritage projects to be undertaken during the first half of this Strategic Plan.

### Key targets:

#### Archive

1. Operational policy. Protocol for Acquisitions. Computer Database.
2. Processing existing and new acquisitions.
3. Information to and appeal to local households.
4. Expanding newspaper cuttings collection.
5. Locating, collecting, recording music, songs poems and reminiscences.
6. Identifying Birse-related items in other collections.
7. Establishing Advisory Group.

#### Heritage Sites

1. Guides & Visits. Disabled access. Recruiting & Training Guides. Preparing ten information sheets/booklets.
2. Cataloguing contents of Bucket Mill, Soutar's Shop & Birse Kirk.
3. Historical Research & Reports on Forest of Birse Commonty, Slewdrum Forest & Birse Kirk.

#### Parish Wide Components

1. Archaeology. Cataloguing and plotting known sites. Survey in Glencat. Community training & outings.
2. Historical Building. Cataloguing & plotting recorded buildings. Reporting important non-listed structures. Booklet on Birse Listed Buildings.
3. Place names. Listing parish place names with dates and sources. Researching known derivations. Booklet on Place names in Birse.

Funding to further develop the project categories will be explored in order to continue the work of the Cultural Heritage Archive post 2005.

### **13. LOCAL FOOTPATHS**

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BCT is already involved in developing path networks on the North Hill of the Forest of Birse Community and in Balfour Wood, as well as its management of the path around Finzean Community Woods. BCT has also started a project to develop a path circuit around Birsemore Hill. In 2004, BCT produced a report on 'Traditional Routes in Birse Parish' and now intends to develop a strategic approach to a parish wide network of local paths.

#### **Key Targets:**

1. Complete further lengths of the path networks on the North Hill in the Forest of Birse Community and in Balfour Wood.
2. Implement the project for a path circuit around Birsemore Hill.
3. To carry out improvements to the Fungle Right of Way in the Forest of Birse Community from Ballochran south to the watershed with Glen Esk.
4. Develop a strategic approach to a parish wide network of local paths in consultation with the communities, local estates and other stakeholders.
- 5.

### **14. FOREST OF BIRSE COMMUNITY**

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BCT was established in 1999 to safeguard ancient rights over the Community and to bring the native pinewoods on the North Hill of the Community into sustainable management.

#### **So far:**

BCT has carried out a very wide range of management on the North Hill during the last five years including, as examples, several woodland and habitat surveys; the removal of old signs, rubbish bins and derelict fencing, improvements to the parking spaces along the public road and the installation of a traffic counter, set up and monitored natural regeneration transects, increased deer control, curtailed sheep grazing, reduced the extent of larch and removed other non-native tree species; felled trees to favour the Finlets Oaks and protect archaeological sites; selectively felled trees to supply timber to the Finzean Mills; planted and protected over 4000 native broadleaves, commissioned archaeological surveys; implemented fire protection measures and improvements to the tracks on the Hill.

#### **Key targets:**

1. To safeguard the Trust's rights and interests over the whole Community and maintain positive relationships with other parties with rights over the Community.
2. To manage and expand the native pinewoods on the North Hill of the Community to safeguard and enhance their natural character for local community benefits and wider public benefits.
3. To revise the North Hill Management Agreement and put in place a new Scottish Forestry Grant Scheme and Management Plan over the North Hill .
4. To maintain deer control to encourage natural regeneration on the North Hill while also carrying out extensive riparian planting using local origin native broadleaves.
5. To maintain and improve the existing track network on the North Hill and the management of public access along the Forest of Birse public road.
6. To maintain and develop the existing fire protection measures for the North Hill.
7. To increase local community involvement in the management of the North Hill.
8. To carry out improvements to the Fungle Right of Way in the Community from Ballochran south to the watershed with Glen Esk.



## 15. BALFOUR WOOD

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BCT became involved with Balfour Wood (241 ha) to safeguard and develop the potential of the Wood to deliver local community benefits. Since 2000, BCT has had a twenty-five year agreement with Scottish Ministers under which the Wood is jointly managed by BCT and Forest Commission Scotland (FCS) on a consensus basis for local community benefit.

### So far:

BCT has produced and agreed a management plan and design plan for the Wood with the Forestry Commission Scotland (FCS). A range of surveys have been undertaken, deer fencing removed, and dykes repaired. Thinning and clearfelling has been carried out concentrating on removing non-native species and opening up riparian areas and views from the Wood. BCT has also taken on a contract for deer control in the Wood and increased the annual cull substantially to reduce damage by the deer in and around the Wood.

### Key targets

1. To continue selective felling in the Wood to improve its habitat value (with particular reference to capercaillie) and amenity quality, including views from the Church Road Right of Way and the sensitive re-stocking of felled areas using native species of local origin.
2. To improve the opportunities for walking in the Wood by developing a network of paths, including the improving the condition of the Church road from the Wood to Birse Kirk, and encouraging community visits.
3. To maintain an adequate level of deer control in the Wood..

## 16. SLEWDRUM FOREST

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BCT became involved with Slewdrum Forest as an extension of its partnership with the Forestry Commission over Balfour Wood. Since 2001, BCT has had a twenty-five year agreement with Scottish Ministers under which Slewdrum Forest (155 ha) is jointly managed on a consensus basis by BCT and Forest Commission Scotland (FCS) for local community benefit.

### So Far

BCT has agreed a revised design plan with FCS major fellings during 2004 along the Kettoch Burn and down between the Little Ord and Meikle Ord summits. Surveys have been undertaken, non-native conifers have been felled from some key habitats and the view opened up from the Little Ord summit.

### Key targets:

1. To develop and implement a Management Plan for the Forest that increases the social, economic and environmental benefits from from the Forest for the local community and wider public.
2. To take on a contract for deer control in Slewdrum Forest and increase the annual deer cull there.
3. To purchase the Forest and develop the additional benefits that this could produce.

## 17. FINZEAN COMMUNITY WOODS

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BCT has a 25 year lease of the Woods (c.15 ha). The Trust became involved because of concern over the lack of safeguards for long term community use and the need for day to day management to maintain it in suitable condition.

### So far:

BCT has undertaken extensive improvements including the construction of 900 metres of surfaced path and work on the surface and drainage of rest of the circular path. The Trust removed old fencing and other rubbish, fenced parts of the boundaries, netted the bridge surfaces, erected waymark posts and safety barriers at road crossings. An information cairn and two benches have been installed, a habitat survey undertaken and a customised map of the Woods produced. General maintenance includes seasonal cutting of grass and broom along path and maintenance to protect young trees. In 2002 the woods received the Scotlands's Finest Small Woodlands award. In 2003 a wildlife pond was created, In 2004, 75 native broadleaves were planted involving school pupils and local residents

**Key targets:**

1. To ensure the sustainable management of the woods and their continued use and enjoyment by local residents.
2. To continue the annual consultation walk with local residents and act on any agreed suggestions where possible.

## **18. FINZEAN SCHOOL WOOD**

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The Trust became involved because of the poor condition of the Wood, (derelict fencing, unsafe style, cattle damage to trees) and lapse of the critical link between the 1973 Wood and the school. Some of the children in the school today are themselves children of those pupils who planted a tree in '73. BCT has a 25 year lease over the original plus additional land, totalling c.0.5 ha. Following initial tree planting and other work at the Wood by school pupils, enthusiasm for the woods has been renewed by participation in BBC Scotland's Beechgrove Garden TV programme, which will enable the construction of a path, new planting and fencing.

**So far:**

BCT has removed old fencing and other accumulated rubbish, erected new fencing, pruned damaged trees, and supervised the planting with local native trees by the school pupils, and provided maintenance of the site including docken cutting and replacement of dead trees. Other associated activities include the inaugural planting event & 're-union event', and linking the project to other environmental activities by pupils (e.g. collecting & growing local tree seed, visits to other local woods).

**Key targets:**

1. To safeguard the condition of the site and ensure the establishment of the trees in co-operation with the school.
2. To ensure annual maintenance of site and trees and to assist the School where possible with its use of the site.
3. To encourage and assist the School with its continuing involvement with the site as an educational resource for Finzean School pupils.

## **19. CORSEDARDAR**

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BCT has a 25 year lease of the site (less than 0.5 ha) on both sides of the public road. The Trust became involved in 1999 due to concern at the condition of the area around the parish War Memorial, and vehicle encroachment towards both the War Memorial and Dardanus Stone. BCT's main responsibilities are to safeguard the stone monuments and maintain and enhance the existing character of the site reflecting its importance to the inhabitants of Birse and the wider public.

**So far:**

BCT has undertaken extensive landscaping work including re-defining and re-surfacing of the parking areas. The dyke has been re-built, accumulated rubbish removed and native trees

planted. In 2000 BCT erected the Birse Millennium Stone and organised the Dedication Event for the Stone as well as the collation of a Book of Remembrance of those named on the War Memorial. A cairn with an information panel was constructed 2003.

**Key targets:**

1. To maintain the site free of rubbish
2. To care for the trees planted at the site.
3. To support the annual Remembrance Day Service at the site.

## **20. BALLOGIE SOUTER'S SHOP**

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BCT took over responsibility for the timber building and its contents following their 'discovery' at the end of 1999, to ensure the shop was preserved for the future, both for local and wider public interest.

**So far:**

The Trust has carried out expensive repairs to the building (e.g. chimney stabilising, ridge work, steps incorporating a hand rail, doorway and window repairs). The contents were catalogued and sorted, (e.g. appropriate storage of documents, copying of old photos), the main ledger from the 1930's was transcribed, and the wall clock and the Souter's Victorian settee were restored.

**Key targets:**

1. To source adequate funding to ensure the conservation of the building and its contents and their use for educational visits.
2. To enter into a long-term agreement with Ballogie Estate.
3. To complete the restoration of the building including replacing the missing Victorian window panes.
4. To complete the cataloguing of the contents, including a computer database to museum standards, identification and marking of all items, and further restoration of items as necessary.
5. To carry out further research into the history of the workshop and its place in the local community, to produce educational material and to undertake a programme of visits.

## **21. FINZEAN OLD SCHOOL BUILDINGS**

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BCT leased the Old School in 2001 to safeguard its future and develop it for community purposes after local concern over the fate of these historic buildings when Aberdeenshire Council decided to sell the site on the open market. The Trust became the owner of the site in December 2003

**So far:**

BCT has carried out extensive repairs and renovations to the buildings to provide a BCT office, other local affordable office space in the main building and to develop the former Soup Kitchen as a local archive, with an environmentally control archive store in the old toilet block. Funds are currently in place to erect a porch and a disabled access at the Soup Kitchen and various other building works.

**Key targets:**

1. To ensure the care and maintenance of the buildings and site for the community.
2. To develop the site for local community benefit and continue to establish the site as a community base for the Trust.

3. To make available local, affordable office space and provide a source of revenue for the Trust.

## **22. FINZEAN SAWMILL**

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BCT's involvement was due to concern that the deteriorating condition of the Mill threatened its survival, with the loss of one lade, collapse of a major retaining wall and platform, leaking roof and other problems. The Trust owns the Sawmill site (c.1ha), including the land under the Turning Mill buildings, and weir. The Turning Mill buildings are owned by the present, fourth generation miller on this site. This Mill is a Grade A listed Historic building.

### **So far:**

BCT has undertaken a major re-build of sawmill, including replacing sarking, corrugated iron roof and wooden gutters, replacing wall claddings and structural timbers, rebuilding the platform and drystone retaining wall amongst other things. The electricity lade has been re-constructed and generator wheel repaired. The sawmill is used to cut timber for this and other BCT projects. It also produced oak for new Scottish Parliament building. The Trust has also researched the history and operation of both mills. These working Mills are popular with visitors.

### **Key targets:**

1. To ensure the conservation and continued operation as a working Sawmill complex.
2. To develop its use as an educational resource.
3. To carry out further restoration work as required.
4. To implement Health and Safety measures.

## **23. BUCKET MILL**

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The Bucket Mill was donated to BCT by Finzean Water Mills Trust in 1999 when that Trust was wound up. BCT owns the site and buildings. Items from the National Museums of Scotland were returned to the Trust in 2003 for repatriation to the Mill. The Bucket Mill is a Grade A listed Historic Building.

### **So far:**

The Trust has undertaken major repairs to the roof and other wide range of other repairs, including the restoration of the main drive drum, and on going routine maintenance and facilitating the re-establishment of bucket making.

### **Key targets:**

1. To ensure the conservation of the Mill and its continued operation as a working Bucket Mill and use for educational purposes.
2. To implement Health and Safety measures.
3. To support production of buckets and tubs in a range of sizes.
4. To undertake repairs and maintenance.
5. To catalogue the contents of the Mill, research the operation and history and produce a manual for future reference.
6. To work closely with Bucket Mill Woodcrafts to achieve the above.

## **24. BIRSE KIRK AND BIRSE HALL**

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BCT purchased both these buildings in 2003 to safeguard their future in response to local community concern after the Church of Scotland put them up for sale on the open market. The Kirk is a Grade B Listed Historic Building.

### **So far:**

BCT has carried out major site improvements at the Hall, including tarring the access road, and reached a Management Agreement with the Birse Area Community Association (BACA) to enable them to use and manage the Hall as the community hall for the Birse area. BCT has agreed a Lease over the Kirk with the Ecumenical Trust for Birse Kirk (ETBK) to enable them conserve the building and safeguard its historic and religious significance. Under these arrangements, BACA and ETBK bear the upkeep and running costs of the buildings.

**Key targets:**

1. To ensure that the terms and conditions of the Management Agreement and Lease over the buildings are fulfilled.
2. To provide assistance where possible to BACA and ETBK with their responsibilities for the conservation and continued use of the buildings.
3. To undertake research into the history of the Kirk and its contents.

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