

Planning and Managing Change

Part I: Vision into Action

The Churches Conservation Trust



Agenda

- 10.00 Welcome
- 10.10 Introductions and setting the scene
- 10.20 Understanding change
- 11.20 BREAK
- 11.35 Agreeing change
- 12.20 LUNCH
- 12.55 Creating an action plan
- 14.20 BREAK
- 14.30 Building your case for support
- 15.30 CLOSE



Aims for today

- 1 Feel comfortable communicating the need for change.
- 2 Understand what is required to make the change.
- 3 Produce an action plan to make this change.



Taylor Review: Setting the scene



© Historic England



The Taylor Review Pilot is a project funded by the Department for Digital, Culture, Media and Sport (DCMS) and run by Historic England. The aim of the pilot is to test some of the recommendations of the 2017 Taylor Review: Sustainability of English Churches and Cathedrals and to provide free support and advice for listed places of worship of all faiths and denominations.

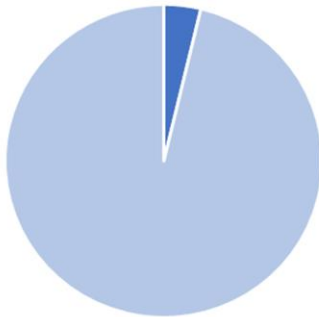
To find out more visit; <https://historicengland.org.uk/advice/caring-for-heritage/places-of-worship/churches-sustainability-review/>

<https://www.gov.uk/government/publications/the-taylor-review-sustainability-of-english-churches-and-cathedrals>

Image: Unitarian Chapel, Church gate Street, Bury St Edmunds © Historic England

Places of worship make up a significant part of our historic environment...

National Heritage List England



■ Places of Worship ■ Total

'Repositories for the collective memories of local communities, (places of worship) deserve considerable respect and care'

Historic England



POWs are a significant part of the historic environment, no matter the listing they are special and unique buildings.

1. There are lots of them!

- Approx. 14,800 POW are listed in England. Representing just over 3% of all listed structures, landscapes, monuments etc.. (NLE 380,000).

2. (and more importantly) People feel strongly about them

- whether or not they are active members of a worshipping congregation
- POWs are often repositories for the collective memories of local communities, and their historic place of burial.
- With their strong claims to special architectural, archaeological, artistic, historic and cultural interest, places of worship deserve considerable respect and care
- Quote from HE listing advice for places of worship (2011)

It doesn't matter whether your building is Grade I, II or II*, what matters is that you go through a process when you want to change your building. Part of that process is that you engage with your local communities to understand their views. Engaging your wider communities to understand their needs will help you make your POW as relevant as possible and give it the greatest chance of sustainability.

...but many struggle to keep going

'Sustainability'

'Ideally the building itself will be able to earn income from some of the wider uses it hosts, contributing to both running and capital costs.'
Taylor Review, 2017



Taylor Review Pilot

- Workshops during 2019-2020
- Community Development Advisor (CDA)
- Fabric Support Officer (FSO)
- Minor Repairs Fund
- Pilot run in two areas; **Greater Manchester** and **Suffolk**



Churches Conservation Trust

- Advisers to Taylor Review.
- Running workshops as part of the pilot.
- Manage 353 'redundant' historic churches.
- Develop uses to keep buildings open and relevant.
- Work with active places of worship to achieve sustainability.



Image: Graham White



Session 2

Understanding and Agreeing Change



Starting point:

What change do you want to make?

What difference will it make?

Do you have a 'Vision' for change?



Harwood Methodist Church, Bolton

Vision: *To be an outward facing church, serving the community, working in partnership with a number of agencies, and seeking to be a focal point of the community, with Christ at our centre, which aims to support the work that we see God already doing in the community round about us.*

Harwood Methodist Church was converted internally to create more flexible space.

Their vision combines mission with community activities and acknowledges partnership working as a key part of delivering this.

Does your POW have a vision? Mission statement? Does it align with any changes they are planning? Maybe an action to take back to your wider governing group.



Example

Christ Church, United Reformed/Baptist Ipswich

The Church family at Christ Church is a worshipping, welcoming community in which all can come to experience the love of God. We seek to share this love, to care for each other, to challenge injustice and to meet need.

We seek:

- To be focused on God in worship together and in our daily lives, through prayer and Bible study, and open to the guidance of the Holy Spirit;
- To be open, friendly and approachable, so that all who come feel welcome;
- To care for and support each other, learning and growing in faith and fellowship;
- To engage with the local and wider community from our existing town centre buildings



Example

Activity 1

Turn to your neighbour...

1. Explain in 3 sentences a change you have in mind for your site and what impact/benefit it will bring
2. Switch.
3. Your neighbour then has 40 seconds to sell your 'vision' to the audience.



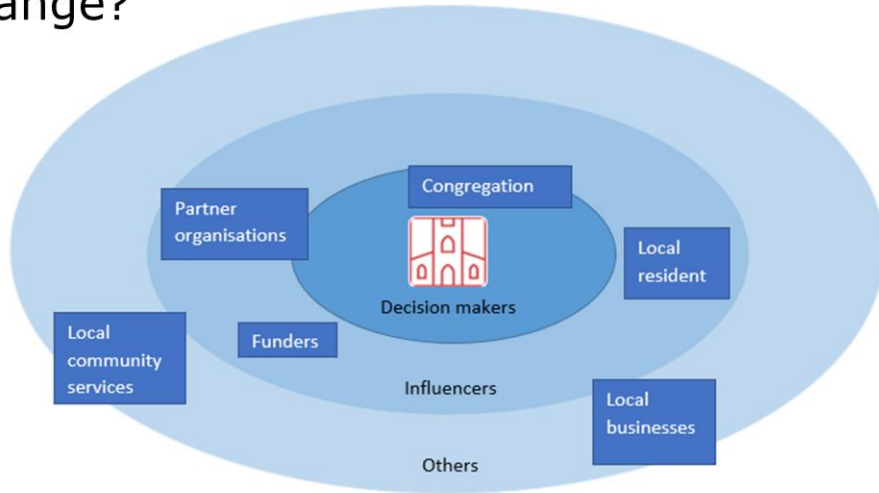
Workshop activity



Check people understand and share your vision

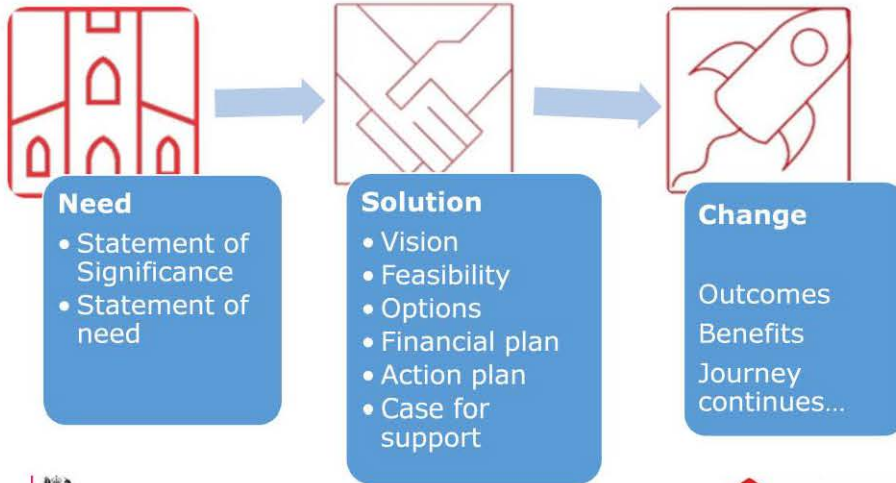


Who needs to know about the change?



It is important that all the people/groups who the change will involve or impact are aware of what you are planning. It is much better to bring people along with you. A stakeholder map can help you identify who needs to know about the change.

Process of change




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Change from a conservation perspective


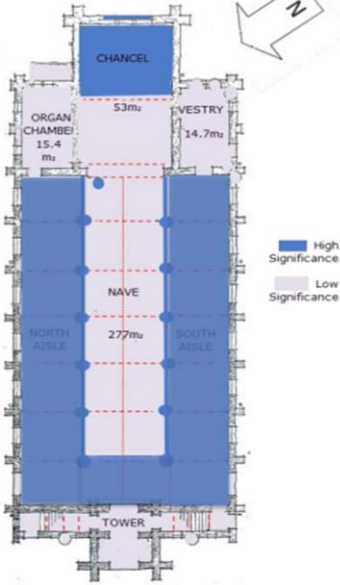
Statement of significance:


- Tells the 'story' of your site – from day one to now.
- Describes what makes the **site** special.
- Shows proposed impact change will have on significance and presents justification.





To find out more visit: <https://historicengland.org.uk/advice/caring-for-heritage/places-of-worship/making-changes-to-your-place-of-worship/principles-for-making-changes/assessing-significance>

Make it visual...

CONTENTS		
<p>Many fittings including the windows, plaques, altar and worship artefacts were removed when Church closed.</p>	L	
<p>Pevsner makes particular reference to the 'curious piers' but otherwise describes St John's as 'almost identical with St James' (Pevsner, 1990).</p>	H	
<p>12 stained glass windows depict the life of St John. Currently in storage and windows blocked in.</p>	M	







Tables can convey lots of information quickly. This table is taken from the listing description, breaking down each element.

Your assessment can include degrees of significance - in this excerpt from the section of the Assessment of Significance on the contents of the building, some areas are assessed as of high significance (the piers), others of low significance (windows in current blocked up form).

Colour coding areas deemed more significant will help stakeholders see the impact of the changes you are proposing.

Change from a community perspective

Statement of needs

- What are the needs of the site and the community?
- What is your solution?
- Why is this the best option?
- What are the consequences of the change?



A statement of needs is a document that allows you to explain your proposal having regard to your statement of significance and the impact of your proposed changes.

It should set out the reasons:

- Why you think your needs cannot be met without making changes to your POW- what options have you considered
- Why you think the proposed changes are necessary to assist you in your worship and mission, but also wider social needs of the community

For example:

- Changing liturgical requirements
- Enhancing the building for easier access
- Allowing for wider use by the community

To find out more visit; <https://historicengland.org.uk/advice/caring-for-heritage/places-of-worship/making-changes-to-your-place-of-worship/principles-for-making-changes/assessing-significance>

Assessing the financial impact of change

1. How much will the change cost?
2. How does the change fit into building's overall operational costs?
3. Where will you find the money to pay for the change?



You need to understand what the change will cost short and long-term.

Firstly, how much will the change cost? See section 2.3 of handout. The table sets out some of the common costs of change. Only some are likely to be relevant to the change you want to make. If you already know costs, start to jot these down. If you don't, start to tick the rows you think are relevant- this is your note to find out about these costs. It is ok not to know at this stage! Lots of people will be able to help- architect/consultant team, sites who have done something similar, your diocese/governing body. Also refer back to workshop 1 on how to cost repair and maintenance work.

Secondly, how does it fit into the building's overall operational costs? See section 2.4 in handout:

- 1) What financial benefit do you expect the change to bring? Record as **income** (Could be negative)
- 2) What will the change cost (**expenditure**)
 - a) capital costs (shown on example as 'repair/new build' but could also be new equipment etc.)
 - b) 'running costs' e.g. increase/decrease utility bills, does it cost money to run new events or activities i.e. do you need to pay someone to organise? Shown on example as 'cost of running events' . Consider all the costs associated with the

change- 'hidden costs' such as insurance, marketing, training.

Also need to consider cash flow in your finance plan. NB your change is additional to 'business as usual', and therefore likely to bring added costs. Are there other changes happening which you need to be aware of? EG PCC may be raising money for new boiler at the same time your committee is raising money for your change. How will you balance this?

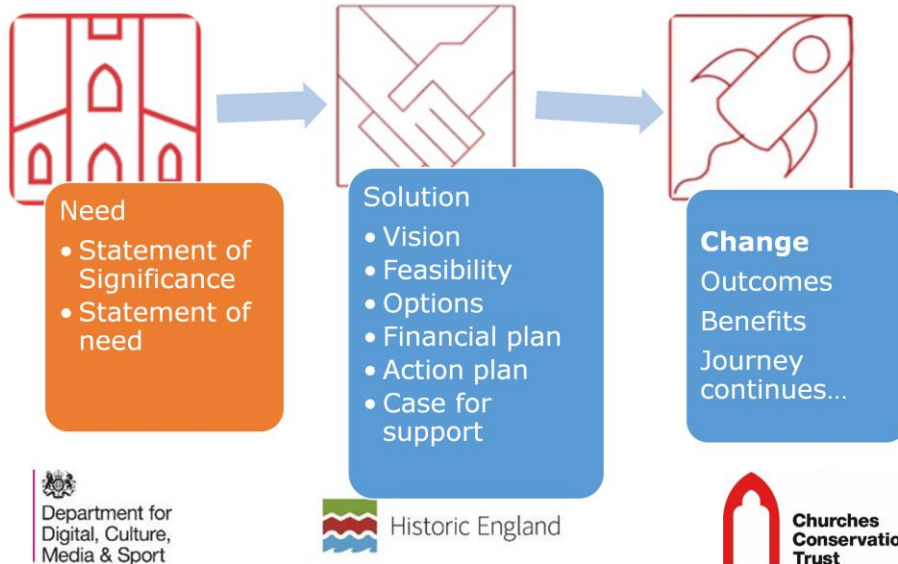
Thirdly, build a finance plan which explains how you will afford the change. See section 2.5 of handout. How much do you already have? Will you need to ask for donations/grants? Can you earn money?

Agreeing change

- Assessment of Significance and Statement of Needs help articulate the change you want to make and why.
- Use as a basis for consultation/ conversations with the people you need to convince – your 'stakeholders'.
- Be prepared for your ideas to be challenged!
- Iterative process- if at first you don't succeed...
- Communication is key



Process of change



We have gone through the information required to outline the need for change – but does that mean we are ready?

Ready for change?

You know...

- ✓ Who needs to know about the planned change.
- ✓ What is significant about your building, and how the change will impact this.
- ✓ Your needs, and the wider community needs.



Activity 1 - Change Game

20 minutes.

Read the scenario in the handout.

Discuss as a group.

Vote on whether you support the change or not.



Workshop activity to get you appraising if the St Nicholas Church in the case study is ready for change.

See pages 2-5 in handout

Case study: St Peter & St Paul, Wangford with Henham

Grade I listed. Dates from 14thC on remains of 12th Cluniac priory,
with 19thC additions



Another case study

Background

- Small church membership (c. 10 regulars).
- New roof required – overall viability of church in question.
- Village community galvanised into action.
- Next phase: new internal facilities.



Changes

1. Installation of WCs and storage at west end of nave.
2. Provision of servery at west of north.
3. £130k costs: funded through legacy and local fundraising.
4. Completed Jan 2018.



Vision for change

To make St Peter & St Paul's activities and facilities more accessible to the community, both religious and secular



Heritage sensitivity/vulnerability

- *The viability of the church in raising money for the upkeep, maintenance and repair of the building requires a continuing programme of events and of public use in-order-to raise income to fund those maintenance and repair items for the future.*

Mitigation

- *To this end the introduction of toilet, kitchen servery and much-needed storage facilities are deemed to be necessary for the wider continued use of the church and to raise money for the present and future maintenance of the church-building fabric.*

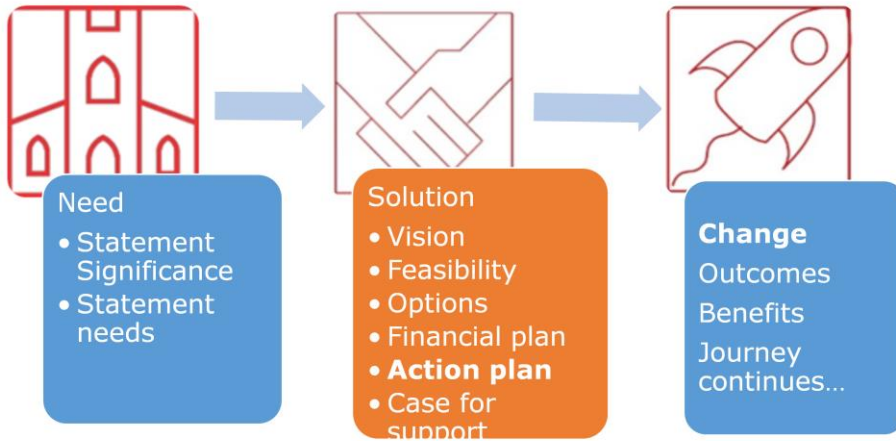


Outcomes – church now hosting:

- Coffee mornings.
- Flower festivals.
- Refreshments after funerals, baptism parties.
- Jazz concerts.
- Drama performances.
- Fundraising events.
- Growing church membership (25-30 regulars).



Process of change




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We are now in the 'solution' part of the process

Creating an action plan

Useful document that pulls together everything you need to know to make the change happen- for you and everyone else!

1. Scope of change.
2. Timetable/Programme.
3. Finance/Fundraising plan (Costs)
4. Roles and responsibilities.
5. Risk.
6. Communication- internal.
7. Communication- external.



Are you ready for an action plan?

- How do you know your change is feasible, viable, desirable?
- Undertaking further work now could save time and money in the long run...



Are you ready to start making change now, or do you need to do other things before you start? You could decide you don't have enough information to complete an action plan for your change, but may need to do some **feasibility/viability** work first, particularly if you are planning a larger change/project.

E.g. you may not have all the info we discussed in the first session and may need to commission surveys, explore costs etc..

1. Scope of change

- What's the vision?
- 'Key deliverables' i.e. what needs to happen for the change to occur?
- ...And what doesn't?
- What benefits will you see?



A clear vision will identify what your change is, and what it isn't.

Think about 'key deliverables' - what things need to happen for the change to have occurred. E.g., if you want to turn an underused vestry into a hireable meeting room. Your deliverables are things like; any refurbishment work, installing Wi-Fi and new furniture, creating a booking system and hire charges. Or Tea points - steps for delivery, get water, drainage, electricity.

Emphasise what does/doesn't need to happen. Must haves/nice to haves - extra add-ons. Consider phasing if it starts to seem too big!

Activity - Scope of Change, Elsdon (10 mins)

Refer to the case study from the Change Game.

Choose one of the changes described (e.g. clear south transept, pew heating).

1. Write a short 'vision' (1-2 sentences) including benefits.
2. Note 3 things you need to do to make this happen.
Consider what does/doesn't need to happen. Separate out the must haves/nice to haves - extra add-ons



See pages 2-5 in handout for Case Study

See page 6 in handout for Action Plan Workbook to start the activities

Activity - Feasibility

Take one 'key deliverable', think about what steps you'll need to take to make it happen to see if it is feasible.

If not, then is there an alternative?

E.g. Power supply for the pew heaters;

- *Is there an existing power supply?*
- *Is it sufficient/safe?*
- *Are there enough plug sockets?*
- *Can you afford new plug sockets?*
- *How will you run cables?*
- *Will you need permission to do the work and should your insurer be notified?*



Followed on from the previous activity

See pages 2-5 in handout

2. Timetable/Programme

Gantt chart example

St Cuthbert's Christmas tree festival		SEP				OCT				NOV				DEC				
Programme 2018	LEAD	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24
Planning																		
Contact local businesses	Fundraising sub-committee																	
Follow up local businesses	Fundraising sub-																	
Order trees (min 4 wks del time)	Treasurer																	
Order sponsor boards (3 wks del)	Treasurer																	
Marketing	volunteers																	
Festival set-up	volunteers																	
Order marketing flyers (1 wk lead)	Treasurer																	
Local paper interviews	Incumbent																	
Festival opens (3rd Dec)																		
School visits	Incumbent																	
Christmas service (24th Dec)	Incumbent																	

Start with a checklist of what you need to create the change. Doesn't have to be everything to start with, you can add to it, but it will be the base for your project/change. Can start with when you want to start the change and when you want to complete it, that is, identify your end point and work backwards...

In this example for planning a Christmas Tree festival, work backwards from any immovable dates, e.g. you want the festival to be open for the 3rd Dec so schools can visit (darker orange squares) then you can plot 'critical path' – what do you need to do when to meet your target date?

Jot down key dates against they key deliverables you have?- e.g. if you want to start a new activity for the new school year, think about when you might need to do things and roughly how much lead in time you need. It's fine not to know- make a note of this too and who you might ask for this info. E.g. how long it takes to repair a roof...

2. Timetable/Programme

'Gantt chart' useful, but lots of tools available- calendars, wall-charts, planners.

Calendar 2014 Calendarpöytä

January	February	March	April	May	June	July	August	September	October	November	December
1 Jan	1 Feb	1 Mar	1 Apr	1 May	1 Jun	1 Jul	1 Aug	1 Sep	1 Oct	1 Nov	1 Dec
2 Jan	2 Feb	2 Mar	2 Apr	2 May	2 Jun	2 Jul	2 Aug	2 Sep	2 Oct	2 Nov	2 Dec
3 Jan	3 Feb	3 Mar	3 Apr	3 May	3 Jun	3 Jul	3 Aug	3 Sep	3 Oct	3 Nov	3 Dec
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3. Costs

Headlines of
**Finance/
Fundraising plans**

Repairing stained glass window			
	Net	VAT	Gross
	£	£	£
INCOME			
Reserves	1000	-	1000
Grants, Trusts, Foundations	1200	240	1440
Donations, fundraising events	1000	-	1000
TOTAL INCOME	3200	240	3440
	Net	VAT	Gross
	£	£	£
EXPENDITURE			
Repair window	2300	460	2,760
Cost of fundraising events	100	20	120
Stained glass school workshop	300	60	360
Extra Insurance	160	32	192
TOTAL EXPENDITURE	2,860	572	3,432
SUMMARY	Net	VAT	Gross
TOTAL INCOME	3,200	240	3,440
TOTAL EXPENDITURE	2,860	572	3,432
Income less expenditure	340	-332	8



Set out as clearly as possible what the change is going to cost and where the money will come from. The work you have done previously to consider costs will inform this section. Again, looking at finances at an earlier feasibility stage will avoid any surprises here.

Include the headlines of your finance/fundraising plans .

Ask other congregations who have done similar things and what it costs them. Encourage to use networks and contacts, going to see other places. Also other denominations too. Costs determined by specification. What company to use, how much costs, any hidden costs etc..

3. Costs

Breakdown of income

FUNDING SOURCE (E.g)	DETAILS	TARGET/£	% of OVERALL FUNDRAISING TARGET
<i>Reserves</i>	Restricted fund from legacy	£1200	24%
<i>Grants</i>	Parish council grant	£2200	44%
<i>Corporate giving</i>	Local business sponsorship	£500	10%
<i>Member giving</i>	Parish collection	£300	6%
<i>Major Donors</i>	Family associated with the church	£200	4%
<i>Fundraising Events</i>	Tea party	£500	10%
<i>Sales/earned income</i>	Commemorative tea towel- 50 @ £2 profit each	£100	2%
<i>Other income (e.g. loan)</i>	NA	NA	0%
TOTAL		£5,000	100%



See handout for another, more detailed, table

What is the breakdown of income - this will help inform the fundraising plan

If intention is to go to funders, consider requirements of funders when planning change.

Fundraising Plan

KEY DATES	ACTION	LEAD	RESULT
June - December	Prospect research, including discussions with key commercial contacts and Trusts and Foundations in the local area	Volunteer group	Fundraising Plan
May/June	Establish Fundraising Board	Vicar/priest/minister	Fundraising Board terms of reference
July	Recruit part-time Fundraising Officer to deliver Fundraising Plan	Church wardens	Employed on a 20 month contract
August	Fundraising/marketing	Fundraising Officer	Match funding achieved <i>Sept 2019 - 33% target met</i> <i>Dec 2019 - 66% target met</i> <i>Feb 2020 - 100% target met</i>



See handout for another, more detailed, table

Break down what you need into key steps. For example, you may have a column for Key Dates, Action, Lead and Result. Think who, what, when and why?

Consider a Fundraising Board- can be made up of various stakeholders e.g. Friends Group, clergy, congregation, local people, project partners etc..

Helpful to set targets. This will also inform your programme for change. You need to wait until you can afford it!

For Further information see the **Funding – some things to consider** document

4. Roles and responsibilities

Who will do what?
Who has overall responsibility?

Role	Responsibilities
	Overall responsibility for change Manage volunteers Ensure Health and Safety compliance
	Produce monthly finance reports Monthly newsletter on progress Induction for new volunteers
	Chair finance board Lead fundraising appeal Oversee fundraising dinner



See handout for blank template

For further information see the **Tasks, Roles and Responsibilities** document

5. Risk – How to capture

Risk register: After school club						
Risk Number	Risk Description	Likelihood of Risk	Severity of Risk	Impact	Mitigation Strategy	Responsibility
1	Low attendance	Low	Medium	Does not cover costs, does not provide useful community service	Close working with school for referrals. Regular marketing.	After school club leader
2	Damage to historic building	Medium	High	Loss of historic fabric. Increased maintenance costs. Loss of trust in congregation.	Activities run in church hall. Staff trained in importance of building, conservation cleaning.	After school club leader
3	Loss of funding	Low	High	Closure of club or PCC subsidise.	Club not reliant on external funding. Income covers running costs. Volunteers support paid club leader.	PCC Treasurer



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Change brings risk. This isn't a reason not to do the change, but you need to understand and manage the risk. Consider the risks relating to building, finance, people, liturgy.

This slide shows an example of a few of the risks of setting up an after school club. Useful to record risk, assess the likelihood of it happening, its severity and impact. How you plan to mitigate against it happening and who is the risk owner, or responsible for monitoring. It is also useful to record how often it will be reviewed and reported in your governance structure.

5. Risk- Ways to manage

- Insurance –insurer will provide guidance, templates for risk assessments.
- Do you have appropriate policies? Safeguarding, volunteering etc..
- Requirement of funding bodies.
- Do you need licences? Music, alcohol etc..



6. Procurement

- Consult advisory committees, DAC, Listed Building Consent, Local Authority building regulations, etc..
- Public tendering - price and transparency. Select based on criteria for value, expertise, experience and price.
- What do external bodies require? e.g. funders, insurers, may specify work to be undertaken by accredited professionals.
- Keep quotes to show competitive and transparent process.



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How will you get the things you need to make the change? Check with advisory committees LBC, local authority building regulations, and permissions (accreditation standards). Be aware if your change is grant funded, the funder may have procurement rules they ask you to follow.

Keep quotes to show competitive, transparent selection process- funders won't be impressed if you just give the job to your mates!

Refer to Stitch In Time workshop, where she discuss how to appoint contractors - this can apply to consultants too.

7. Communications - internal

Who needs to know what, when?

- How will consultants report to you?
- Regular reports for PCC, Finance Committee, Diocese etc..
- How will you keep your congregation updated?



See handout for templates

8. Communications - external

How will you communicate the change externally?

- Local residents, users, audiences.
- Funders, donors.
- Local Authority.
- Friends Groups.
- Partner organisations such as schools, health providers etc..



Top tips for your action plan...

1. Write the plan as a team.
2. Keep reviewing.
3. Be prepared to change.
4. Be honest and realistic.
5. Change nearly always takes longer than you think...



Taking stock....

- ✓ Understood/agreed change.
- ✓ Have an action plan in place.
- ✓ Identified areas where you need support - people, money, publicity, expertise etc..
- ✓ Now you need a tool that explains succinctly why you need support...



Session 3:

Building your case for support



What is a case for support?

Sets out why the person reading it should support your proposed change

1. What's the need?
2. What's your solution?
3. What benefits will the change have?
4. How they can help?



Your action plan will be great, but it will be far too detailed for public consumption! It is your internal plan of action. Now we need to translate your plan for all those you need to help you along the way...this is best communicated as a 'case for support'.

Draw on information you already have from the statements of significance and need. This isn't about creating a whole new document from scratch, just understanding what your intended audience needs to know

Refer to Case for Support example in handout when going through the next slides, plus links at the end of the handout.

Case for support: 1. Need

- Refer back to statement of needs
- Be factual and specific, but create a narrative- why should the reader care?



What is the scale and nature of the problem? Refer back to your statement of needs .

Case for support: 2. Solution

- What is your vision?
- How are you going to achieve it?
- What help/support do you already have?



What are you proposing? What's the rationale? What community support do you have? Refer to your vision, feasibility work and action plan.

Case for support: 3. Benefits

- What will be achieved for the building, mission and wider society?

*And by when – timeframe – immediate, long term, on-going.
This may vary depending on who you are presenting the case of support to. Crucial to know for permissions and funding.*



Case for support: 4. Ask for help

- What do you need?
- How will it help?

NB Doesn't have to be a request for money!



What do you need? Who else is helping? What difference with their help make?

Case for support: 5. Audience

Important to tailor information to your audience.

Research what **they** want to know e.g. different funders, planning authorities, local residents.



You may be writing different cases for support for different 'stakeholders'. E.g. funders, planning authorities, local people.

Activity: Your case for support

1. Revisit the change for your own building, discussed at the start of today.
2. Jot down a few bullet points under each heading of the Case for Support in your workbooks: Need, Solution, Benefit, Ask.
3. Using your case for support, explain your change again to your partner.
4. Your partner will pitch your project to the rest of the table.

Each table will be allocated a specific audience.



Workshop activity

Audiences: congregation, heritage funder, funder interested in health and wellbeing, planning committee, local business

Group Discussion

Were the pitches more convincing?

Did you find yourself using different information depending on your audience?



Workshop activity

Recap of today's aims

- 1 Feel comfortable communicating the need for change.
- 2 Understand what is required to make the change.
- 3 Produce an action plan to make this change.



Thank You

Taylor Review Pilot Workshops

June 2019 – January 2020



Information and links in this document were accurate at the time of June 2020