Planning and Managing Change: Turning a vision into an action plan

Contents

TAYLOR REVIEW PILOT WORKSHOP: MANAGING CHANGE: VISION INTO ACTION

1.Change Activity: St Nicholas Church - Statement of Need

Based on the information in the case study below, complete the table for each of the proposed changes:

1. General information

The parish church of St Nicolas, Elsdon is a Grade I listed building of great historical and architectural interest, situated within the Northumberland National Park. The church building dates from c.1400 and has the largest capacity in the Borders, seating 200. It has a churchyard which offers much interest, including several memorials also heritage listed.

The last quinquennial report was completed in July 2017, showing the building to be in good condition, thanks to a grant which paid for urgent repairs to the roof and windows. The statement of significance was updated as part of this work. The church has electricity and water, but no heating.

Alongside twice-monthly services, and regular weddings, baptisms and funerals, the church offers a quiet and peaceful place for prayer and contemplation. The church is open daily and there is a well-used village hall 200 meters down the road, which is partially open daily to allow public access to the toilets.

The church is looked after by the Parochial Church Council, Team Rector, Assistant Curate and two churchwardens. There is a small but dedicated group of volunteers, who perform essential tasks and support and organise events.

2. What we need

With the essential repairs now complete, the heritage of the church is in better condition. However, the longer term sustainability of St Nicholas' is at risk unless ways can be found to engage the wider community in its management and create a wider range of activities.

- The village hall is well used by local residents, accommodating film nights, meetings, coffee mornings and community group activities. The church needs to make more of its importance as a historic building, as nowhere else in the village provides a point to learn about the history of Elsdon.
- It also needs to attract people outside of the village, to visit or attend events. There are a number of local artists and history societies looking for

venues to display exhibitions. There are also musicians and local authors interested in holding performances in a unique space.

- St Nicolas also needs to consider how it will contribute to the wider regional needs of growing rural tourism infrastructure and community wellbeing, and addressing social isolation.

2.1   Division of the space

We will create a flexible area within the church that can be used as an exhibition and display area and smaller performance space.

The south transept has been selected as the most appropriate area, with the best natural light. Five rows of pews will need to be removed, and the flooring made good with a temporary level wooden surface.

2.2   Facilities and services

To encourage visitors to stay longer, a community tea point will be set up on the south porch. Equipment can initially be borrowed from the village hall, but the church will eventually need to purchase their own tea urn etc.

Specialist exhibition lighting will be installed in the south transept.

Heated pew cushions in the nave will improve comfort of the congregation and audiences attending performances.

2.3   Access

Although the church is a single level from the porch through to the nave and transepts, there is a shallow step up to the porch from the churchyard path. To improve access a shallow ramp is to be added to external step.

2.4   New activity

The church will work with local individuals and organisations to develop a programme of activities to increase the church's use and income through new heritage and cultural events with the aim of attracting a wider audience. The church will be a 'receiver' space, hiring areas to external groups. A simple booking form and terms of hire will be developed.

3. Why do you need it now?

Timing – Next year is the church's 600th year, and a special celebration is taking place on 6th December (St Nicolas feast day), in the form of a Christmas tree festival. We need the changes to take place in this year, and be completed ready for the celebration.

Funds – The church has been left a legacy, specifically for the wider community use of the building. There is also a local community fund, which will award only if works are carried out within two years. This local fund is only open for a limited time.

Capacity - The Team Rector will be retiring in two years. The church wishes to undertake this project before they leave, to support the small number of volunteers.

4. <u>What is the evidence for the need?</u>

Elsdon is ideally positioned to benefit from the promotion of Northumberland National Park as a countryside and heritage tourism destination. Many comments in the visitor book are left by walkers. There is no café in the village, so offering a rest point, refreshment and interesting exhibition/heritage display would enhance their experience.

In the summer months the church has been trialing different events, such as choral concert, book events, and displaying borrowed museum pieces in the church. Feedback forms collected at these events, and comments from the visitor book, demonstrate a demand for more events like this.

The population of the village is ageing, and there is a need to ensure the space is as accessible as possible.

5. <u>Justification</u>

The changes proposed in this statement will:

- Help to grow our vision of creating a welcoming and flexible space that will support our developing programme of heritage and cultural activities.
- Increase the church's use and income through new events, activities and by widening its audience;
- Have minimal impact on the significance of the historic fabric of the church.
- Engage visitors and the local community more with the heritage of St Nicolas' and wider area.

Change	YES	NO	ENOUGH INFORMATION?	COMMENTS
Clear south transept of pews				
Install exhibition lighting to the south transept				
Install heating pew heating				
Provide a shallow ramp to the external porch step				
Create a booking form and process for third party hire				

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2.Action Plan Workbook

Using the case study from the change game, work through the Action Plan workbook

Vision for change (include benefits):

Key deliverables:

1.

2.

3.

2.1   Scope of change

Feasibility

Key deliverable:

Steps needed to deliver	Questions on the steps	Is it feasible Y/N – alternatives?

2.2 Timetable/Programme

Could be set out as a 'Gantt' chart (a Gantt chart is a useful graphical tool which shows activities or tasks performed against time) as in the example below:

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																	▓

Populate template on the next page using the steps need for your key deliverable. Things to bear in mind:

- When you want to complete (if time bound) – work backwards from that?
- What are the target dates along the way – those things which are 'fixed' in your programme (e.g. funding application deadline?
- Who will be the lead to carry out each of the steps/tasks?
- What steps need to be complete before the next can start? And what steps can be done in parallel?

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Project:		MONTH				MONTH					MONTH				MONTH			
Programme	LEAD	W 1	W 2	W 3	W 4	W 1	W 2	W 3	W 4	W 5	W 1	W 2	W 3	W 4	W 1	W 2	W 3	W 4
Action:																		

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2.3 Cost of change – short term

Capital Costs	Description	Cost	VAT	Total
	Purchase of property			
	Repair and New building work			
	Repair and Conservation			
	New Build			
	Other capital work (office fit out)			
	Equipment and materials (capital - interpretation & PPE)			
	Other costs (capital)			
	Insurances			
	Professional fees			
	Architect (inc. CDM)			
	Quantity Surveyor			
	Services Engineer			
	Structural Engineer			
	Drainage			
	Construction PM			
	Archaeologist			
	Lighting consultant			
	Acoustic Consultant			
	Catering consultant			
	Other Specialists			
	Project Manager			
	TOTAL			
Activity Costs	**Description**		**VAT**	**Total**
	New staff costs			
	Role:			
	Role:			
	Role:			
	Office Costs(Laptop, phone and line rental for staff)			
	Training for Staff			
	Paid training placements			
	Travel for staff			
	Travel + Expenses for Volunteers			
	Training for Volunteers			
	Equipment and Materials (Activity)			
	Other Costs (Activity)			
	Professional fees relating to the above			
	Interpretation consultant			
	Family Facilitator			
	TOTAL			
Other Costs	**Description**	**Cost**	**VAT**	**Total**
	Recruitment			
	Publicity and promotion			
	Evaluation			
	Other costs (overheads and running cost support)			
	Contingency			
	Inflation			
	Increased Management and Maintenance Costs			
	TOTAL			
TOTAL		**£0.00**	**£0.00**	**£0.00**

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2.4 Budget for change- longer term

		Average	Year 0 (change)	Year 1
INCOME		**£**	**£**	**£**
Earned income				
Events		3000.00	1,000	4000.00
Third party hire			-	6000.00
Donations and fundraising		200.00	5,500	800.00
TOTAL INCOME Excluding VAT where applicable		**3200.00**	**6500.00** #	**10800.00**
		Average	**Year 0**	**Year 1**
EXPENDITURE		**£**	**£**	**£**
Property Costs				
Repair/new build			5,000	200
Maintenance and inspection costs		2000.00	2000.00	2200.00
Utilities (water & energy)		1000.00	1050.00	1102.50
Security Alarms + call outs		1902.00	1902.00	1940.04
Insurances contribution		280.00	280.00	540.00
Sinking fund		0.00	500.00	500.00
WCs/Facilities Cleaning and Maintenance		250.00	0.00	500.00
Refuse Disposal		0.00	0.00	250.00
TOTAL OVERHEAD COSTS		**5,432**	**5,732**	**7,033**
Running Costs				
Cost of running events		1516.00	1,137	1,600
Cost of third party hire				1,200
Fundraising and publicity costs		0.00	250.00	262.50
Depreciation (equipment and materials)			500.00	525.00
TOTAL OTHER COSTS		**1,516**	**1,887**	**3,588**
SUMMARY INCOME AND EXPENDITURE FORECAST		**2017/18**	**Year 0**	**Year 1**
TOTAL INCOME		**3,200**	**6,500**	**10,800**
TOTAL EXPENDITURE		**6,948**	**7,619**	**10,620**
Income less expenditure		**-3,748**	**-1,119**	**180**

Short term: the cost of making the change happen
- Capital – the costs to do physical change and external help for this
- Activity – the costs to make operational change and external help for this
- Other costs – depending on change, support costs to help with capital and activity

Long term: what the on-going costs will be as a result of the change
- Average year – income and expenditure before change
- Year 0 (change) – what the costs will be to make the change happen (short term costs and fundraising)
- Year 1 – income and expenditure after change

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2.5   Financing change- Income targets

FUNDING SOURCE (E.g)	DETAILS	TARGET/£	% of OVERALL FUNDRAISING TARGET
Reserves			
Grants			
Corporate giving			
Member giving			
Major Donors			
Fundraising Events			
Sales/earned income			
Other income (e.g. loan)			
TOTAL			100%

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2.6   Grants, trusts and foundations 'prospect' table

Example:

Matchfunding source	what they fund, if specified: Capital, Revenue or Activities	element of project to be funded	Size of av grant (£)	£ potential target (e.g. 80% of av. grant)	ranking	comments	ACTION
Garfield Weston	Capital	conservation but also installation of facilities		15,000	high	Want to see 'churches being opened up for inclusive community use'.	Discuss at committee meeting
National Churches Trust	Capital	range: Repairs, Community Grant, Project Development and Maintenance.	5,000-25,000	8,000	high	Community Grant most suitable	Friends group to complete application
Paul Hamlyn Foundation	Activity	tackling disadvantage; young people; the arts			medium	suitable- but need to focus on young people as well	Discuss at committee meeting
Landfill Trust - Biffa	Capital/Activity	Building services- heating?	500-1.6m. Average £33k	26,000	medium	Eligible for 'Community Buildings' scheme as in catchment area.	Ask CVS to help write bid?
Architectural Heritage Fund	Capital	heritage/social impact			low	need to result in change of use- not relevant	NA
TOTAL INCOME				49,000			

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Potential match funding source	What they fund, if specified: Capital, Revenue or Activities	Element of project to be funded	Contact details	£ size of average grant (where known)/range	£ potential target (e.g. 80% of average grant)	Ranking (High, medium, low likelihood)	Comments
TOTAL INCOME TO BE TARGETED					0		

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2.7   Roles and responsibilities

Role	Responsibilities
1.	
2.	
3.	
4.	
5.	

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2.8   Risk

Risk register:

Risk Number	Risk Description	Likelihood of Risk	Severity of Risk	Impact	Mitigation Strategy	Responsibility
1						
2						
3						
4						

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2.9   Procurement

Chose a key deliverable that requires external/paid for resource to be procured, what you'd need to consult with about the procurement and will it need a full tender process (brief, interviews) or just three quotes.

Deliverable	Service to be procured	Who to consult first and why?	Procurement processes
e.g. Installing pew heating	*e.g Electrician*	*e.g. insurance – may want accreditation and safety check certificate post works*	*e.g. three quotes*

How would you go about finding the right contractor?

2.10 Internal Communications

Person/group	Method communication and person responsible	Frequency

2.11   External communications

Person/group	Method communication and person responsible	Frequency

3 Case for support- example

Section 1: Need

> **The need for change**
>
> Since the 14th century the church has been at the heart of local village life. As the needs of the village have evolved, the church has not kept up, and footfall has dwindled. Our vision is that the church will once more welcome local people, visitors and tourists alike, but we need investment to fulfill our potential and contribute to civic life again.

Section 2: Solution

> **The 'Welcome' Project**
>
> With financial support from the Town Council we commissioned our conservation accredited architects to draw up plans to meet our vision. We aim to meet the needs of the community whilst conserving and interpreting the historical features which make the building so special.
>
> We will achieve this by:
>
> - Installing a new, fully accessible, west door which faces onto the High Street
> - Creating a display and exhibition area at the west end
> - Create a welcome point with information about community services
> - Train 5 new welcome volunteers to be on hand 5 days a week

Section 3: Benefits

Impact of the Welcome project

The new entrance will help people physically access the building.

The display and exhibition area will be a focal point for visitors and tourists to the village, as the closure of the village museum means there is no historical information currently available to visitors.

The new display area and welcome point will also be a resource for the local community to share their talents, news and information. Again, there is currently no such provision in the village.

The welcome volunteers will support and direct visitors and local people alike, supporting the Local Plan to meet its objective of reducing social isolation and loneliness, boosting civic pride and attracting tourists and visitors who in turn will use local businesses.

Section 4: Ask for help

How You Can Help

The total cost of this exciting project is xxx. We are applying for a grant of XXX from XXX, who have been interested in our proposals for a number of years. To date we are secured XXX from fundraising events. Now we need to raise the balance of XXX to realize our vision. Will you help us with a donation of XXX to secure the future of our special church so it can continue to serve its community for another 700 years?

3.1   Case for Support Template

Audience pitching to is: _____

NEED	
SOLUTION	
BENEFIT	
ASK	

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4 Links to useful resources and case studies

Session 1: Understanding and Agreeing Change

Crossing the Threshold: Developing Your Ideas	www.hereford.anglican.org/documents/chapter-5/ Full document, Crossing the Threshold a step-by-step guide to developing your place of worship for wider community use and managing a successful building project https://cofehereford.contentfiles.net/media/documents/document/2019/06/COFE_02316_CrossingTheThreshold-BOOK-12Mar19.pdf
Statements of significance and need, Historic England	https://historicengland.org.uk/advice/caring-for-heritage/places-of-worship/making-changes-to-your-place-of-worship/principles-for-making-changes/assessing-significance/#Section5Text
Statements of Significance and need, Church of England	https://facultyonline.churchofengland.org/Data/Sites/1/media/user-manuals/guidance_on_statements_of_significance_and_need.pdf
Methodist Church, Needs Analysis	www.mandsmethodists.org.uk/public/files/Governance/needsanalysis.pdf
Methodist Church, Manchester. Statements of significance and need	www.methodist.org.uk/media/2403/statementsignifneed.pdf
Diocese of Gloucester How to Write a Good Statement of Significance and Need (useful, succinct guide)	www.gloucester.anglican.org/content/pages/documents/1353070506.pdf
Diocese of Manchester Statement of significance and need	www.manchester.anglican.org/church-buildings/historic-buildings/
Church Building Projects- lots of practical guides and resources	www.churchbuildingprojects.co.uk/
National Churches Trust, Writing a Statement of Significance and need	www.nationalchurchestrust.org/writing-plans-and-reports/statements-significance-and-need
National Churches Trust.	www.nationalchurchestrust.org/how-plan-your-project/creating-detailed-budget

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Creating a detailed budget	
National Churches Trust. How to fundraise for your project	www.nationalchurchestrust.org/managing-building-projects/how-fundraise-your-project
Crossing the Threshold: Raising the Funds	www.hereford.anglican.org/documents/chapter-10/
Manchester Diocese: Adapting for the Future	www.manchester.anglican.org/church-buildings/adapting-future/
Diocese Truro – Diocesan Advisory Committee	Packed with helpful information on statement significance, needs, advice and guidance on many aspects of changing historic churches. Also good on managing risk. www.trurodiocese.org.uk/wp-content/uploads/2016/07/DoT-DAC-Booklet-WEB.pdf
Germinate, Arthur Rank Centre, resources for Rural Churches	https://germinate.net/church-life/rural-church-buildings/1-listed-places-of-worship-and-statements-of-need-and-significance/
Congregationalist Federation: Statements of Significance	www.congregational.org.uk/buildings-and-property/statements-of-significance

Session 2: Creating an action plan

Crossing the Threshold: Planning Your Project	www.hereford.anglican.org/documents/chapter-7/
Quakers In Britain. Property advice.	www.quaker.org.uk/our-organisation/support-for-meetings/property-advice-1
National Council for Voluntary Organisations – Know How website. Lots of free resources for charitable groups	https://knowhow.ncvo.org.uk/
The Methodist Church – Changing, Growing Churches	https://www.methodist.org.uk/our-work/our-work-in-britain/evangelism-growth/changing-growing-churches/

Session 3: Building your case for support

Church of England Case for Support template	www.churchofengland.org/sites/default/files/2018-12/Parish-Resources_FG7_Case-for-support-template.pdf
How to Make the Business Case for your Project	https://www.visitchurches.org.uk/what-we-do/regeneration-and-communities/project-toolkits.html
National Churches Trust examples	www.nationalchurchestrust.org/sites/default/files/Case%20for%20support%20example.pdf

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Other initiatives:

Places of Welcome	www.placesofwelcome.org.uk/
Street Wisdom	www.streetwisdom.org/

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