National Heritage Memorial Fund:
Listed Places of Worship Roof Repair Fund Evaluation

Final Report - April 2017

NATIONAL HERITAGE MEMORIAL FUND

Department for Culture Media & Sport

Roof grant lets church put buckets away

LISTED PLACES OF WORSHIP
ROOF REPAIR FUND

ERS
30 Queen Square
Bristol
BS1 4ND

T: 0117 927 3401
F: 0117 929 4189
E: bristol@ers.org.uk
www.ers.org.uk

Images: https://twitter.com/peterroganarch; https://twitter.com/stjohnspborough; and http://www.lpowroof.org.uk/

Contents Page

EXECUTIVE SUMMARY

Introduction

In November 2016 ERS was commissioned to evaluate the Listed Places of Worship Roof Repair Fund (RRF) – a heritage building, conservation-led scheme which aimed to make the UK's listed places of worship weathertight thus ensuring the heritage significance of the building is preserved. The scheme invited applications from congregations and organisations of all faiths and denominations across the UK. It is intended to ensure historic places of worship are safe and remain open for commemoration, services or other community functions.

The Chancellor of the Exchequer announced the Listed Places of Worship: Roof Repair Fund (RRF) in his Autumn Statement on the 3rd of December 2014. The National Heritage Memorial Fund (NHMF) was chosen to administer the grant programme on behalf of the Treasury and the Department of Culture, Media and Sport (DCMS). Unsurprisingly there was huge interest in the programme.

Two rounds were operated in 2015 and 2016: over 1,900 applications were received in Round 1 with the combined value of the grant requests totalling over £105 million; and over 1,500 applications were received in Round 2 with the combined grant requests valued at £88 million.

Study Objectives

Through this evaluation, NHMF hoped to establish the extent to which the intended outcomes have been achieved and obtain useful feedback to be used in developing future grant programmes.

The NHMF was particularly interested in:

- Understanding background information for all projects around: listing grade; size of project and size of grant; the scale of roof repair; value for money; and the nature of the wider community it served, including whether the building served an urban, suburban or rural population;

- Information about the development of the projects; how applicants arrived at the project, including any consultation work they carried out; who they received advice from;

- What, if any, other funders were involved in projects;

- How effective repairs have been in tackling each building's repair need, the quality and impact of any repair work on the fabric and the overall condition of the building and whether maintenance has improved post-completion;

- Applicants' experiences of the application process between the first and second rounds; and

- The wider community outcomes resulting from repair works.

Process issues were also examined, which included the management of the programme, successful areas of project delivery, practical problems encountered and the ways such problems were resolved along with key lessons learnt.

Methodology

The study methodology included a number of distinct stages. An initial phase of desk research was carried out to inform the evaluation approach, in terms of the sampling and design of the data collection tools, and the analysis for the remainder of the evaluation study.

Following this review, an in depth consultation exercise involved:

- Members of the programme team;

- Key programme stakeholders;

- Round 1 grantees – via telephone interview; and

- Round 2 grantees – via E-survey.

Programme level consultations, were undertaken with the management team and the individual Grants Officers to gather insights into the outcomes and lessons learned from those that directly manage the delivery of the scheme. Further interviews were undertaken with representatives from the Department of Culture Media and Sport and ChurchCare.

The sampling approach for grantee consultation ensured a representative spread of grantees by region and grant size. In addition, sampling criteria applied included: faith and denomination; rural and urban settings; and project status.

For Round 1 the selected grant recipients were contacted for an in-depth telephone interviews and 91 were successfully consulted. This achieved sample size, across the sample criteria ensured that a balanced view of project experiences was captured [1]. An e-survey was sent to the selected Round 2 grantees, receiving 70 responses in total.

Changes and Learning between Rounds 1 and 2

Based on learning from Round 1, a number of changes were implemented to the application and delivery stages in Round 2 to make it easier for applicants to navigate, as well as freeing-up time for Grants Officers to concentrate on monitoring. The following changes were applied:

- The repair work must have been identified via a recent condition survey as being urgently required within the next two years (reduced from 5 years);

- If the condition survey (e.g. Quinquennial Inspection) was undertaken more than 3 years ago at the point of application a supplementary report or letter was required from a professional advisor;

- The application form, process, and associated guidance were simplified, for example

- Extended space in the application form to explain the reasons for any restrictions in the accounts of the place of worship and to inform the funder about opening arrangements (to inform decisions about value for money and sustainability);

- A letter of support confirming best practice from the DAC or equivalent was no longer required;

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[1] For a total of 502 grantees, we needed to engage with a sample of at least 81 round 1 grantees to be 95% confident that the responses for questions could obtain a ±10% confidence interval.

- A location plan was no longer required;

- The application window was extended;

- 'Permission to start' workshops and site visits were introduced to better inform and support grantees;

- Increased staff capacity was assigned towards management of the project caseload;

- IT systems were improved; and

- Payment scheduling was altered to minimise cash flow issues for grantees.

Evaluation Findings

There are a number of areas in which the programme has worked very successfully and the positive experience of the grantees points to its effective delivery. . Our consultation revealed a number of ways in which the programme has been effectively delivered and there were no identifiable differences in the level of service or the experiences from grantees across different faiths, denominations, or geographical areas:

The Timing of the Fund

Many LPOWs expressed gratitude for the timeliness of the fund, as a significant number lacked the appropriate finances to cover repair costs. For example, a number of Quinquennial reports had identified necessary works which would require local parishes to fund raise tens of thousands of pounds.

The Positive Experience of Grant Recipients and Applicants

The majority of grantees were very positive about their experiences working on the project. Many described working with NHMF, respective contractors, and architects as very straightforward. For many grantees the repairs had been carried out as planned in their application.

The Ongoing Support of the Grants Officers

The dedication of the Grants Officers to support projects has been a major success of the fund and applicants felt that the level of ongoing support and communication provided by Officers, both during the project application and project delivery, was invaluable.

The Value of Support from Professionals

For many grantees the ongoing support from appointed architects and surveyors, throughout the development of onsite works (and in some cases the application), had been extremely valuable.

Outcomes and Impacts

It is clear that the RRF Programme has achieved its primary objective, and has successfully administered funding to allow Listed Places of Worship to carry out urgent repairs in order to render buildings watertight. The vast majority of Listed Places of Worship with completed works reported their building to be both ***watertight and weatherproof*** following completion of the repairs undertaken.

However, an extremely positive aspect of the RRF has also been the wider outcomes and impacts across local communities, in addition to the original aims of the programme. For Round 1, many grantees stated that the services and activities offered by Listed Places of Worship had now been safeguarded. The Grants Officers felt that the fund had played a key part in saving important listed buildings that would now be protected for another 100 years. Others stated that the works had raised the profile of the place across communities, reigniting interest in the building.

Overall, feedback from grantees indicates that local communities (whether they were of faith or not) had been positive about the improvements to the listed buildings. The repair works were also felt to have retained levels of pride within communities.

Many of the grantees were also looking to undertake other projects to improve their building once the roof repairs had been completed.

The evidence also suggests that in some cases, the skills, capabilities, and confidence of grantees has increased as a result of managing the repair project (from application through to delivery). An unexpected outcome of the fund has been that recipients feel their experience has given them the confidence to seek additional grants for further projects.

Impacts for NHMF

Overall, administering the funding is considered to have been both a new and positive experience for NHMF, which has demonstrated the capacity and adaptability of the team. The RRF could act as a useful template for other similar or related schemes, particularly those which need to be administered at relatively short notice.

Staff members have increased their skills and knowledge; developing specialist skills and expertise in building conservation procedures and an in-depth knowledge of ecclesiastical processes.

Finally, the success in administering the funding may also contributes positively towards ***NHMF's reputation*** as a reliable and competent distributor of public funds.

Conclusions and Lessons Learned

There are a number of lessons that might be considered for future NHMF programme delivery.

Crucially, there was also variation in the knowledge and skills across project teams as the vast majority of projects were managed by retired volunteers. While the application and delivery stages were relatively straight forward for those with experience of project management, this had been a challenging process for others

A number of projects had experienced difficulties collating the required financial details, especially without the assistance of a treasurer. For future programmes, it might be more straightforward for grantees to develop more accurate financial estimates if the timescales for applications were lengthened to some extent.

Several respondents had also experienced problems with accessing VAT repayments.   More guidance on recovering VAT and how to manage this recovery within project cash flow may have been welcomed at the outset of the project.

In addition, Round 1 respondents also felt that support might have been available through additional site visits from Grants Officers, to ensure they had a better understanding of 'on the ground' issues. This suggestion was put into place as part of Round 2 showing commitment from NHMF to continuous learning and improvement. There was also interest in additional training and information on how to look after your building following the repair works.

Furthermore, there is clearly a demand for similar funded programmes in the future and many project leads referred to other premises that required significant repairs.

1. INTRODUCTION

Report Context

1.1 In November 2016 ERS was commissioned to evaluate the Listed Places of Worship Roof Repair Fund (RRF) – a heritage building, conservation-led scheme which aimed to make the UK's listed places of worship weathertight thus ensuring the heritage significance of the building is preserved. The scheme invited applications from congregations and organisations of all faiths and denominations across the UK. It is intended to ensure historic places of worship are safe and remain open for commemoration, services or other community functions.

1.2 The Chancellor of the Exchequer announced the Listed Places of Worship: Roof Repair Fund (RRF) in his Autumn Statement on the 3rd of December 2014. The National Heritage Memorial Fund (NHMF) was chosen to administer the grant programme on behalf of the Treasury and the Department of Culture, Media and Sport (DCMS). Unsurprisingly there was huge interest in the programme.

1.3 Two rounds were operated in 2015 and 2016: over 1,900 applications were received in round 1 with the combined value of the grant requests totalling over £105 million; and over 1,500 applications were received in round 2 with the combined grant requests valued at £88 million.

1.4 A total of 502 Listed Places of Worship (POW) were successful in the first round of funding with £26.4m in total grants being awarded; and 401 were successful in the second round of funding with grants of nearly £23 million awarded.

National Heritage Memorial Fund

1.5 The NHMF was established in 1980 and has a long history in safeguarding heritage at risk. The NHMF acts as the funder of last resort to save important heritage, from works of art to manuscripts or wildlife havens, with the specific purpose of being in memorial to those who have given their lives for the United Kingdom. The NHMF is given Grant in Aid by central government; during 2016-17 it received £5 million excluding the Grant in Aid for the Roof Repair Scheme.

1.6 In 1994 the NHMF and its trustees were given the task of distributing the heritage share of Lottery money, operating as the Heritage Lottery Fund (HLF). The HLF was created to distribute funds raised by the National Lottery to support the full breadth of national, regional, and local heritage projects for people and communities. Since 2013, HLF has been operating under the Strategic Framework '*A lasting difference for heritage and people'* to underpin grant-making decisions[2].

1.7 Whilst the HLF operates under the auspices of the NHMF, the NHMF accounts for a small proportion of work, investing around £5 million in grants annually. In comparison the HLF will allocate around £435 million in grants in 2016-17 with greater emphasis on access, learning and engagement.

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[2] https://www.hlf.org.uk/about-us

Study Objectives

1.8 Through this evaluation, NHMF hoped to establish the extent to which the intended outcomes have been achieved and obtain useful feedback to be used in developing future grant programmes.

1.9 The NHMF was also interested in:

- Understanding background information for all projects around: listing grade; size of project and size of grant; the scale of roof repair; value for money; and the nature of the wider community it served, including whether the building served an urban, suburban or rural population;

- Information about the development of the projects; how applicants arrived at the project, including any consultation work they carried out; who they received advice from, e.g. NHMF staff or external sources such as support officers, other advisory bodies, DACs or statutory agencies and whether their plans changed as the project unfolded;

- What, if any, other funders were involved in projects;

- Applicants' experiences of the application process and project delivery across both the first and second funding rounds;

- The effectiveness of NHMF's delivery of the fund and key delivery lessons;

- Outcomes of the funding, i.e. how effective repairs have been in tackling each building's repair need, the quality and impact of any repair work on the fabric and the overall condition of the building and whether maintenance has improved post-completion; and

- Any wider community impacts as a result of repair works undertaken.

1.10 Process issues were also examined, which included the management of the programme, successful areas of project delivery, practical problems encountered and the ways such problems were resolved along with key lessons learnt.

Evaluation Methodology

1.11 The approach to the study has been designed to meet the dual purpose of evaluation: that is, to both 'prove and improve' outcomes and provide practical and evidence-based recommendations. An initial phase of desk research informed the evaluation approach, in terms of sampling framework development and the design of data collection tools.

Programme Team and Stakeholder Interviews

1.12 Programme level consultations (with programme management and Grants Officers) were undertaken to gather insights about the outcomes and lessons learned from those who direct and manage delivery of the fund. Consultations focussed on:

- The context and rationale of the programme;

- Intended deliverables and outcomes of the fund (and impressions of the extent to which these had been achieved);

- The application process and monitoring systems;

- Delivery challenges experienced by NHMF;

- Changes and key learning between round 1 and round 2 of the programme;

- Support made available to applicants and successful grantees;

- Challenges faced by grantees and Grants Officers; and

- Lessons learned.

1.13 Further interviews were undertaken with wider representatives from DCMS and ChurchCare.

Grantee Telephone Interviews and E-survey

Sampling Approach

1.14 Identifying a representative sample for the project review has been crucial to ensure robust and reliable conclusions and recommendations could be drawn. An initial review of key project documentation assisted in identifying key criteria for the sampling exercise across Rounds 1 and 2.

1.15 Successful grantees were spread across the UK, thus it was important to ensure the sample reflected the **geographical distribution** of funds, as well as the **grant size** awarded. In addition, the sample also ensured a representative spread against:

- **Faith and denomination:** the sample included proportions of Grantees with the following faiths and denominations; Church of England, Church of Scotland, Church in Wales, Church of Ireland, Baptist, Non-Conformist, Roman Catholic, Congregational, Jewish, Methodist, United Reformed Church, URC, Presbyterian, Evangelical, Free Church, Pentecostal, Quaker, Greek Orthodox, Adventist and Buddhist;

- **Redundant churches** i.e. a church held in trust and/or looked after by another body for its historical value;

- **Rural / urban classification:** postcodes were analysed against the UK Government rurality classification[3]; and

- **Project status:** whether projects were currently ongoing or completed.

Round 1 Grantee Telephone Interviews

Semi-structured telephone interviews were carried out with 91 Grantees. This achieved sample size, spread across the sampling criteria, ensured that a balanced view of people's perspective were captured[4]. The analysis commenced during the latter stages of data collection and before all of the interviews were complete a level of theoretical saturation was achieved.

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[3] The Government rurality classification defines areas as rural if they are outside settlements with a resident population greater than 10,000.

[4] For a total of 502 grantees, we needed to engage with a sample of at least 81 round 1 grantees to be 95% confident that the responses for questions could obtain a ±10% confidence interval.

1.16   Interviews lasted between 25 and 60 minutes and provided in-depth qualitative feedback, revealing an overall picture of the applicant experience. The consultations with Round 1 Grantees focussed on obtaining; an overview of the project; grantees' experience and perception of the application process and project delivery; the effectiveness of the repair works; and, the wider outcomes and benefits of the funding award.

Round 2 Grantee E-survey

1.17   In order to undertake comparative analysis of the Round 1 and Round 2 applicant experience, an e-survey was distributed to successful applicants from Round 2. To make this easier for respondents, the open-ended questions used in the qualitative interviews were in many instances replaced with multiple choice questions. An e-survey was sent to the selected Round 2 grantees, receiving 70 responses in total. While this achieved sample size means that the experiences that were drawn from grantees cannot be considered statistically significant[5], they remain strongly representative of all grantees across Round 2.

1.18   Further areas of questioning were also included in the Round 2 survey, which included perceptions of: changes in the application process (for organisations re-applying following an unsuccessful submission in Round 1); and the feedback available for unsuccessful grantees at the Round 1 stage.

Report Structure

1.19   The Evaluation report is structured as follows:

- Section 2: The Listed Places of Worship Roof Repair Fund Programme and Context
- Section 3: The Application Process
- Section 4: Project Delivery
- Section 5: Programme Management
- Section 6: Learning Points
- Section 7: Outcomes and Impacts
- Section 8: Lessons Learned and Recommendations

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[5] For a total of 401 grantees, we needed to engage with a sample of at least 78 round 2 grantees to be 95% confident that the responses for questions could obtain a ±10% confidence interval.

2.   THE LISTED PLACES OF WORSHIP ROOF REPAIR FUND PROGRAMME AND CONTEXT

Introduction

2.1   There is at least one place of worship in almost every village throughout the country. They are often the most distinctive building in the area, and the focus of many civil and social activities in addition to their primary role as a place of worship. They also provide an important visual connection to the past.

2.2   Across the UK there are over 1,100 historic places of worship on national Buildings at Risk Registers. Historic England's At Risk Register indicates that 6% of listed places of worship, or 887 buildings, are physically 'at risk'[6].

Context

2.3   It is important to understand and appreciate the strategic and policy context in which the programme was conceived and was delivered. This evaluation assists with understanding the eventual outcomes of the fund and the impacts that it will have on strategic objectives and targets.

Autumn Statement 2014

2.4   The 2014 Autumn Statement set out the next steps of the Government's long-term economic plan. In relation to Culture and Heritage, the Statement outlined that the Government would provide £15 million for a new Listed Places of Worship Roof Repair Fund that would be available across the whole of the UK to support the maintenance of Church Roofs in 2015[7].

2.5   The National Heritage Memorial Fund (HMF) had been approached by Department for Culture Media and Sport (DCMS) earlier in the year with a request to administer the fund if and when it was announced. The fund was to be used for grants of between £10,000 and £100,000 to listed places of worship of all faiths and denominations where the repair of roof and rainwater goods was considered to be urgent and necessary.

2.6   As a result of the initial demand for the fund the Chancellor of the Exchequer announced in his March 2015 Budget Statement that the fund was being increased to £55m. £30m was earmarked for commitment in 2015/16. The remaining £25m of the budget was retained to make new awards under a second round of the programme.

The Culture White Paper

2.7   The Culture White Paper highlights the crucial contribution to the regeneration, health and wellbeing of regions, towns and cities that cultural sectors make. Furthermore the document states that churches have been "*at the centre of our communities for centuries*".

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[6] Law and Religion (2016) *Listed Places of Worship Roof Repair Fund – Some Legal Issues*
[7] HM Treasury (2014) *Autumn Statement* Available at:
https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/382327/44695_Accessible.pdf

2.8   The White Paper congratulates The Church of England and the Churches Conservation Trust for their work in demonstrating how churches can be opened up to the wider public bringing their histories to life. It suggests that further action is required to ensure that churches remain at the heart of communities[8].

2.9   To this end it advises that the Government provide additional funding (£20 million in 2016/17 and 2017/18) to extend the First World War Centenary Cathedral Repair Fund and establish a review to examine how church buildings and cathedrals can become more financially sustainable.

First World War Centenary Cathedral Repairs Fund

2.10   This fund was announced at the same time as the Roof Repair Fund as part of the 2014 Autumn Statement. It was felt by the Government that cathedrals acted as powerful symbols of Britain's shared history. The fund was also established to coincide with the centenary of the First World War[9].

2.11   The purpose of the fund was to carry out necessary repair works to the fabric of listed cathedral churches in England, identified by the architect or surveyor responsible for the cathedral; in the case of Anglican cathedrals this will usually be through the Quinquennial Inspection.

2.12   Alternatively, works may be recommended by the architect or surveyor in a statement of need. To be eligible for funding, the works should be necessary to keep the building wind-proof and weather-tight, safe, and open to the public. The repair works should also be essential to prevention of further deterioration of the fabric of the listed building and ensure the listed buildings are in a good and safe state of repair in order to host events commemorating WW1.

The Church Buildings Review

2.13   As part of its Reform and Renewal programme, the Church of England published a report in 2015 and launched a consultation on proposals to improve the support for its 16,000 church buildings. The report came from the Church Buildings review group. It constituted the first attempt to undertake a comprehensive review of the Church of England's stewardship of its church buildings[10].

2.14   The review notes that more than three quarters of the Church of England's churches are listed, and the Church of England is responsible for nearly half of the Grade I listed buildings in England. More than half of churches are in rural areas and more than 90% of these are listed.

2.15   The key principles of the review highlighted that local ownership of the buildings (not in a legal sense) was preferred as it would continue to facilitate wider community support for what is often the most significant historical building in the locality. It also suggests that Diocese need to be more flexible in their approaches to how buildings are used.

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[8] DCMS (March 2016) *The Culture White Paper*. Available at:
https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/510798/DCMS_The_Culture_White_Paper__3_.pdf
[9] Cathedrals in England could apply to the First World War Centenary Cathedral Repairs Fund
[10] https://www.churchofengland.org/media/2383717/church_buildings_review_report_2015.pdf

English Churches & Cathedrals Sustainability Review

2.16   In the 2016 Budget, alongside the announcement of an additional £20 million across two years to extend the First World War Centenary Cathedral Repairs Fund, the government announced a review to examine how church buildings and cathedrals in England can become more financially sustainable. A Task Force was subsequently set up with the role of exploring models for financing maintenance and repairs, and will report to the Secretary of State for Culture and the Chancellor in April 2017[11].

2.17   The review will consult with congregations, Church of England, Churches Conservation Trust and communities to identify tools/resources/models for using buildings for purposes beyond worship, and specifically address how barriers to income generation can be removed.

2.18   The scope includes current lottery and central government funding, such as those managed by Church of England, Churches Conservation Trust and Heritage Lottery Fund. The HLF and other stakeholders will contribute their expertise of managing funds and the use and sustainability of places of worship.

Rationale for Investment

2.19   From undertaking a review of the relevant documentation it is evident that there was a growing need for intervention in ensuring that historical buildings are protected. There is recognition from the Church of England and the reviews that have been undertaken, that places of worship are not simply about faith but play an important role in bringing people together to partake in activities and events. Adopting such a community-focused approach will ensure the sustainability of such buildings for years to come and is rightly an important objective for the Roof Repair Fund. Furthermore, DCMS were interested in the wider community outcomes generated as a result of the fund.

2.20   Coupled with this thinking has been the requirement to ensure that places of worship are physically fit for purpose in order to continue to support their congregations and offer additional facilities to the wider communities in which they reside.

Programme

2.21   The initial £15 million allocated to the RRF was announced in the 2014 Autumn Statement[12]. This total was subsequently increased to nearly £55m with approximately £50m awarded in grants. £5m was allocated towards the costs of running the programme as well as contingency for grant increases. In recognition of NHMF's core values of clarity, prioritisation, judgement, and recognising diversity alongside authority and accountability, the RRF is administered by the NHMF on behalf of DCMS. The NHMF recognise their obligations in spending public money to achieve economy, efficiency and effectiveness.

2.22   ChurchCare had the opportunity to comment on early versions of draft project documentation, of which some suggestions were adopted whilst other weren't. There was an acceptance that HLF had significant expertise in this field so there was confidence that the process would be well managed.

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[11] DCMS (March 2016) *English Churches and Cathedrals Sustainability Review*. Available at:
https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/509933/ChurchTaskForce.pdf
[12] HM Treasury (2014) *Autumn Statement* Available at:
https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/382327/44695_Accessible.pdf

2.23   The outcomes of the programme were as follows and provide the basis against which this evaluation is measured:

- Making buildings weathertight;

- Improved fabric and overall condition of the building e.g. prevention of damp;

- Reduced maintenance or recurrence of e.g. fungal growth, insect infestation;

- Buildings removed from the Heritage at Risk Register;

- Increased use by community groups;

- Preservation of local history and heritage;

- Increased pride within communities;

- Prevention of further damage and more costly future repairs;

- 'Freeing' up of finances for additional repair work;

- Skills development within project teams for project management, form completion etc.;

- POWs increased confidence to bid for future resources; and

- Increased / sustainable use by the community it serves.

Round 1

2.24   The first round of the RRF generated 1904 funding applications (January 2015). The scheme was extremely popular and   a total of 502 grants were awarded.

2.25   Grant award decisions were based on the degree of urgency, the added value of public money and whether the project was well-planned and realistic. Applications were received from places of worship of four major faiths: Christianity; Islam; Judaism; and Buddhism. Within the Christian community, applications were received from 26 different denominations. Organisations were required to be a formally constituted group before applying to the fund.

2.26   The RRF focussed on like-for-like repairs, retaining as much of the original material as possible. Eligible works included: roof repairs (e.g. timbers, ceilings, vaults, roof coverings such as shingles or tiles); rainwater disposal (e.g. gutters valleys, hoppers, gullies, drains and soakaways); specialist investigations (bat surveys and mitigation); and other related capital and professional fees.

2.27   Within the combined NHMF and HLF Business Plan for 2016-17 the targets for the monitoring team which was set up in 2015 (after the initial round had been administered) are set out :

- Complete first-round monitoring;

- Assess second round applications and further monitoring;

- 95% of first phase projects will be completed;

- 100% of second phase budget will be committed;

- 85% of second phase projects will have started and the first payment made; and

- DCMS and HMT will be satisfied with programme delivery.

2.28   In order to receive a grant from the RRF, those applying were required to evidence their eligibility. A number of criteria were included in the application guidance for the grant:

- POW had to be a listed Grade I, II* II, A, B, C or equivalent;

- POW is used solely or mainly as a public place of worship;

- POW used as a public place of worship at least 6 times a year;

- The applicant organisation is responsible for the maintenance and repair of the POW;

- Project is for the repair of roof and/or rainwater disposal systems;

- The repair works to the POW were identified in a recent condition survey or other professional report;

- If a POW previously received grant funding via CADW, English Heritage, Historic Scotland, Northern Ireland Environment Agency, HLF or any other Lottery distributor, the associated project *has been completed* at the time of application to RRF;

- The repairs identified were 'urgent' in nature and should have been identified in a recent (within the last 5 years for round 1 and within the last 2 years for round 2) condition survey by a qualified professional; and

- The intended repairs needed to be sympathetic to the listed status of the buildings ensuring the heritage significance of the buildings was preserved.

2.29   The unanticipated level of demand alongside the compressed timetable meant it was necessary to call on the support of the HLF Operations Teams to assist with the administration of the programme. Regional and country teams assessed the applications from within their own geographical area where possible. The Deputy Director of Operations, Programme Director, and Programme Manager then moderated the assessments to ensure consistency.

2.30   Assessment was based on a range of criteria set out in the application guidance and application form. The key criteria were:

- Level of urgency of the repairs;

- That the building was listed (listing grade level was not a factor in decision-making);

- Risks to delivery of a successful scheme;

- Risks to sustaining the repairs in the future; and

- Value for money.

2.31   The initial grant sizes ranged between £10,000 - £100,000 to meet the costs of urgent repairs to roofs and rainwater disposal systems and, where necessary, for further structural investigations and other specialist reports such as bat surveys. It was important that applicants were not required to provide match funding. However, for those seeking funding in Round 1, there was a significant demand for grant increases post-approval. In total 114 grantees requested an uplift to the value of £1,923,000. This was largely due to higher than expected tender prices, but also the discovery of further deterioration once works had started. The short application window was a key contributory factor in applicants obtaining inaccurate costs for the repair works.

Round 2

2.32   The second round of funding opened up on the 2nd of December 2015 with a closing date of the 26th of February.. The application assessment process was the same in Round 2, with only a change to the level of urgency of repairs (from five years down to two years), and a supplementary report or a letter being required to support the application if the structural report had been undertaken more than 3 years ago, altering the eligibility criteria.

2.33   In total 1,502 applications were received. In all, 808 were resubmissions and 401 grants were awarded. Grant sizes ranged between 10,000 and 100,000. The quality of the applications was noticeably better in the second round, due in part to the longer application window which, feedback suggests, allowed applicants to cost up the works in more detail.

Funding Profile

2.34   Table 2.1 below identifies the total number of projects identified by region for Round 1 and Round 2. This table has been collated from the information on successful grants available from the NHMF website[13].

2.35   The distribution of RRF grants was very similar across the different regions of the UK for both round 1 and round 2. For both rounds there were a greater number of POWs that received funding in the South West and South East, which was reflective of the higher proportion of POWs within these regions in comparison with parts of the UK, particularly the North East and Northern Ireland.

Table 2.1: RRF Grants by Region, Country				
	Round 1		Round 2	
Region	**Number**	**Percentage of Grants**	**Number**	**Percentage of Grants**
East Midlands	50	10%	45	11%
East of England	61	12%	54	14%
London	32	6%	17	4%
North East	13	3%	11	3%
North West	29	6%	26	7%
South East	71	14%	52	13%
South West	85	17%	64	16%
West Midlands	33	7%	36	9%
Yorkshire and The Humber	34	7%	33	8%
ENGLAND	**408**	**81%**	**338**	**85%**
Northern Ireland	25	5%	17	4%
Scotland	42	8%	23	6%
Wales	27	5%	22	6%
TOTAL UK	**502**	**100%**	**401**	**100%**

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[13] *Who's been successful?* Available at: http://www.lpowroof.org.uk/?q=en/grantees

2.36   Table 2.2 below outlines the number of projects that had been administered across the UK by initial grant size (before any additions were made to the grant by NHMF).

Table 2.2: RRF Grant Value	Round 1		Round 2	
Grant Value	Grant Number	Grant Percentage	Grant Number	Grant Percentage
0 - £24,999	125	25%	73	18%
£25,000 - £49,999	136	27%	98	25%
£50,000 - £74,999	98	20%	101	25%
£75,000 - £100,000	143	28%	128	32%
TOTAL	502	100%	401	100%

2.37   The table shows a relatively even distribution of projects by grant size for Round 1, with a slightly higher percentage of grants that were greater than £75,000. Under Round 2 there was a greater proportion of higher value grants awarded.

Changes and Learning between Rounds 1 and 2

2.38   Based on learning from Round 1 a number of changes were implemented to the application and delivery stages in Round 2 to make it easier for applicants to navigate through as well as freeing up time for Grants Officers to concentrate on monitoring (through reduction of the number of queries in relation to the application process).

2.39   The following changes were included:

- The repair work must have been identified via a recent condition survey as being urgently required within the next two years (reduced from 5 years);

- If the condition survey (e.g. Quinquennial Inspection) was undertaken more than 3 years ago at the point of application a supplementary report or letter was required from a professional advisor;

- The application form, process, and associated guidance were simplified;

- Extended space in the application form to explain the reasons for any restrictions in the accounts of the place of worship and to inform the funder about opening arrangements (to inform decisions about value for money and sustainability);

- A letter of support confirming best practice from the DAC or equivalent was no longer required;

- A location plan was no longer required;

- The application window was extended;

- 'Permission to start' workshops and site visits were introduced to better inform and support grantees;

- Increased staff capacity was assigned towards management of the project caseload;

- IT systems were improved; and

- Payment scheduling was altered to minimise cash flow issues for grantees.

Ongoing Quality Assurance

2.40 In order to ensure that eventual projects were of a good standard, NHMF built a number of checks and measures into the application and monitoring process.

2.41 The main method of assuring quality was the requirement to have a condition survey undertaken of the building which highlighted the need for the repair works. This survey had to have been undertaken either by an approved architect or an equivalent professional (surveyor etc.) and evidenced within the application form. Many of the successful applicants maintained a relationship with their architect/surveyor throughout the process, providing further quality assurance to NHMF of required works, cost estimates, contracting procedures, and project management.

2.42 Within the application form, applicants were required to outline their experience of delivering other projects of a similar nature, demonstrating their capacity to deliver the RRF project within the parameters of the fund. They were also asked to detail their accounts to show that the POW had the financial standing to deliver the project and withstand any shortfalls should they arise. This check was put in place to ensure that the grant recipients had the appropriate accounting procedures to manage the funding correctly.

2.43 During the delivery stages of the project, grant recipients were required to provide the RRF team with information before payments were released. This information included: progress reports; additional surveys and permissions; financial and cash flow forecasts; and procurement information (of contractors). Evidence of invoices was also required to secure the second and final payments.

2.44 DCMS were also kept well informed of progress through monthly meetings.

3.   THE APPLICATION PROCESS

Introduction

3.1   This section highlights the experiences of both the applicants/grantees and the NHMF during the application stage. It also identifies the changes that occurred between Rounds 1 and 2 to determine whether these improvements made a difference for those administering the grants and those in receipt of funding.

The Application Form

3.2   The majority of successful Round 1 applicants found the available guidance and supporting online documents to be very clear and helpful; the process was considered particularly straightforward for applicants with previous experience working through grant applications.

3.3   In contrast, a very small number of grantees felt that the guidance had been lengthy, detailed and complex to read through. This was more likely the case for applicants with no prior experience of working through similar grant applications or had not enlisted the support of professional architects and surveyors.

3.4   All applicants consulted found the eligibility criteria to be clear and understandable, providing grantees with a good understanding of the aims and objectives behind the scheme as well as application requirements. This ensured POWs were confident the necessary criteria would be met before making an application.

3.5   Once the programme was launched ChurchCare circulated messages via the Diocese Network of the opportunity and their offer of support. They produced a checklist and provided simplified guidance for members. They also produced a template 'letter of support' that was accessed via their website.

3.6   The experience of applicants for Round 2 was similar; grantees were asked to rate their thoughts of the application process on a scale of 1 to 5, where 1 was strongly disagree and 5 was strongly agree. This is shown in Table 3.1.

Table 3.1: Grantee Rating of the Application Process	
How Would you Rate the Following Aspects of the Application Process?	**Rating Average**
The application guidance was clear and easy to understand (n=61)	4.18
The eligibility criteria was easy to follow (n=61)	4.40
It was clear what supporting documents were required for the application (n=60)	4.32
The online information was useful and informative (n=60)	4.41
Timescales for submissions and feedback were well-communicated (n=60)	4.43
Communication with NHMF throughout the application process was effective (n=60)	4.52

3.7   Nearly all of the respondents in Round 2 (90%) either agreed (57%) or strongly agreed (33%) that the application guidance and supporting documents that accompanied the application form were clear and easy to understand; with an average response of 4.18 out of 5. The majority of applicants (89%) either agreed (33%) or strongly agreed (56%) that the eligibility criteria was straightforward and easy to follow.   Finally, a significant proportion of respondents (86%) either agreed (23%) or strongly agreed (63%) that the timescales for submissions were clearly outlined; with an average response of 4.43 out of 5.

3.8   Overall, these findings reveal that applicants had found the applications process to be relatively straightforward during Round 2.

Support from Grants Officers during the Application Phase

3.9   A high number of Round 1 applicants received support from NHMF Grants Officers during the application process and an important theme from the interviews was value of the ongoing communication and available support. All respondents stated that Grants Officers had been patient, efficient and understanding to their needs and requirements. The Grants Officers were highly praised and seen as very helpful and responsive:

"Kept me on track. Couldn't have done it but for her. I'm a rookie in grant applications. If I didn't send (the) right thing she would patiently write back and say can you send this as well."

3.10   All respondents that requested additional support recognised that Grants Officers had played an important role supporting the application process; for example, providing detailed step-by-step guidance by telephone to address particular issues, or providing advice and clarification for any technical questions. The Grants Officers also ensured that grantees had fully understood the terms and requirements of the grant.

3.11   The majority of applicants for Round 2 also stated that Grants Officers were extremely helpful throughout the entire process including at the application stage:

"Received excellent and very prompt support from the Grant Officers"

"I spoke to the Grant Officer several times regarding technicalities & intension I also attended an information meeting which helped a lot"

"Regional officer very helpful by phone and also put in touch with a previous successful applicant from a different church. Helped inform our application immensely"

"[We received help from the] funding body. It did not change our project but was most helpful in dealing with the application process"

Support from Professionals during the Application Process

3.12   Applications for projects across Rounds 1 and 2 were largely undertaken by retired volunteers and there was variation in the knowledge and skill-level of applicants. Both the project application and delivery stages were relatively simple for volunteers with experience completing grant applications, project management or working on similar projects during their professional lives. These volunteers included retired civil servants, fundraisers and architects.

3.13   Conversely, applicants without this experience had found working through the process more challenging, and a small number had employed church approved architects, quantity surveyors and/or other consultants to assist.

3.14   For other applicants, architects/surveyors had provided supporting information and assisted with obtaining cost estimates from prospective contractors. It was felt that architects especially have played a key supporting role throughout the application and delivery process:

"The architect was really helpful and had lots of experience"

"Received professional building advice from heritage architects which allowed the project to be properly scoped"

Differences across Faith, Denominations and Geography

3.15   As part of the consultation we also asked questions regarding the faith and/or denomination of the POW and their geographical area (nation and region). , although no identifiable differences in the levels of service received or in the experiences of the grantees were noted during the analysis.

4. PROJECT DELIVERY

Ongoing communication and support from Grants Officers

4.1 A considerable number of Round 1 grant recipients were supported by the Grants Officers during the delivery of the projects across a range of ongoing support services, which included assistance with IT queries and form completion.

4.2 The vast majority of recipients found the ongoing communication and support extremely valuable and Officers were highly praised::

"They were better than flexible (to our problems). They were proactive in saying whether you had a problem and if there is a delay you will be able to do x, y, z."

'The support was very good, especially when we changed the contractors we were using. There wasn't much bureaucracy and the fund was very effective.'

4.3 While a number of recipients had not approached Officers for support during the project delivery stage, all of the projects had recognised the range of support systems that were in place.

4.4 Regular communication channels and monthly team meetings were in place between Grants Officers to develop solutions to common issues, which proved invaluable.

4.5 Round 2 grant recipients were also very complementary of the support received from Grants Officers. The majority of respondents (65%) felt that the support had been very good and the survey revealed an average weighted score of 4.75 (out of a possible 5). This clearly demonstrates the success of the delivery and wider achievement of project outcomes:

"Since receiving a grant, our Grants Officer has been constantly available, offering prompt advice and also being very flexible when we have requested slight amendments to the programme."

"Answered emails promptly and clearly. Briefed me clearly on the 'permission to start' process."

"They were very helpful, especially when changing approved purposes."

"Whenever advice was needed the Funding Officer always replied very quickly to telephone calls or e-mails."

Round 2 Workshops

4.6 Following Round 1, NHMF reviewed elements of the application and delivery processes with the clear intention of improving processes for Round 2. Feedback was also considered from grant recipients alongside the experiences of the delivery team. This represents a headline achievement, in that learning was identified and implemented between the two funding rounds (and to positive effect).

4.7 One change was the introduction of 'Permission to Start' workshops, which were delivered across the UK. By taking the grantees through the process, explaining the portal, taking them through the required forms and delivery process, and answering any queries, it was intended this would make the delivery of individual projects more efficient and straightforward.

4.8 A number of Round 2 recipients cited how the workshops had been supportive :

"The assistance and guidance provided by the Grants Officer was very good. The original training course in Manchester and the slides that were forwarded following on from this were very helpful. We were very impressed with this support, which reduced any issues that might have emerged"

"The Application Process was clear and the training workshops were useful. So far, the communications (with Grants Officers) has been excellent"

"I attended two very useful presentations... These helped in understanding the application process"

"Yes I spoke to the Grants Officer several times regarding technicalities & intension. I also attended an information meeting which helped a lot"

"Absolutely excellent, was great to meet the team at a workshop, should be compulsory. Allayed any fears I had"

4.9 Following the workshops, Grants Officers also received fewer telephone calls and emails for assistance compared with Round 1, which has given them more time to monitor the projects; process claims more promptly; and meet with grant recipients during site visits. These visits provided an opportunity to build up relationships with POW leads, witness the good work that the fund was supporting and understand any issues that might not be as easily communicated via telephone or email.

4.10 The feedback following the workshops had been very positive and a high percentage of attendees had either 'strongly agreed' or 'agreed' with the following statements:

Table 4.1: Workshop Feedback

Statement	% Strongly Agreeing
The Content was useful	83
The information was relevant to me	86
The presentation was the right level for me	81
The workshops were timely and helped me with project planning	84
The venue and arrangements were accessible	68
The location of the workshop was good	65

4.11 Many attendees had described the workshops as 'excellent' or 'very good' in the comments section of the feedback form. However, some further areas for improvement were also identified:

▪ More time spent on navigating the website;

▪ More information on VAT and how to claim it back (something that came out in the round 1 consultations);

▪ Provision of some worked examples and case studies;

▪ Handouts provided for more complicated elements (e.g. tender processes);

▪ Permission to Start flow chart;

▪ Provision of one-to-one conversations with the Grants Officers; and

▪ FAQ's sheet to take home.

4.12   In total 83% of those that responded to the feedback questionnaire following the workshops strongly agreed that the content was well delivered and useful.   However, some recipients in the additional comments section felt that a workshop at the beginning of the application process would have also proved useful. This might be considered for any future programmes.

Professional Support during Project Delivery

4.13   During Round 1, some grant recipients had appointed architects and surveyors. The vast majority believed this support had been essential:

In one case, the POW architect managed project delivery, developing a good working relationship with the POW and contractors. The architect held monthly meetings with the builders and responded very quickly if the POW faced any urgent queries. The architect also remained in contact with the Grants Officers on behalf of the project, responding to reporting requirements and addressing particular queries or issues that arose during the works.

For another project, the POW architect had been working on a further three or four roof repair projects with POWs based in the Diocese, which meant they had become very knowledgeable and experienced in this field of heritage repair works.

4.14   For other projects, POW volunteers had taken a more central role managing the project. These volunteers had been on site daily to manage the contractors throughout the progression of the works. Whilst volunteers with experience of project management had found this process relatively straightforward, others had found the project coordination challenging and experienced significant demands on their time.

4.15   Whilst most of the grant recipients in Round 2 have only recently commenced with project delivery, 96% of respondents have appointed an approved architect/qualified professional to work with. This has provided much needed support and expertise and provided a level of assurance to NHMF that the funding is being spent appropriately on quality work.

4.16   However, in the vast majority of cases, it has been representatives from the POW's in both Rounds 1 and 2 that have managed the application and delivery processes dealing with the ongoing financial monitoring and reporting. Moreover, based on our consultations, the lead contact was a POW non-professional volunteer for 97% of all POWs consulted during Round 1 and 98% consulted during Round 2.

5. PROGRAMME MANAGEMENT

The Grants Officers

5.1   The dedication of the Grants Officers to support projects has been a major success of the fund, particularly in supporting POW to manage unforeseen challenges and progress project delivery.

5.2   While the allocated Grants Officers changed on multiple occasions for some projects (for example, as a result of maternity leave); this was understood by most recipients and did not affect the quality of support.

> *"I want to thank those involved. We had multiple project officers and dealt with 2 or 3 people. All of them were extremely helpful and I have no criticism of how it was handled or the people I dealt with. All phone calls and emails were deal with promptly and efficiently."*

5.3   Building individual relationships with grant recipients was an important asset to the programme, and ongoing communication was felt by consultees to have been particularly effective when a single point of contact was maintained throughout their involvement with the fund.

5.4   The flexible and supportive role of the Grants Officers, particularly when addressing the issues and challenges faced by grantees, suggests that the RRF team has developed extensive experience to administer and manage other grant services in the future.

Positive Experience Working on the Project

5.5   At the outset of the programme, the majority of applicants had waited between two and three months to hear whether their application had been successful. This was in line with the timescales communicated upon application and many had been surprised how quickly the fund responded; given the number applications there were received.

5.6   The majority of grant recipients were very positive about their experiences working on the project, even those with limited experience of working on similar projects in the past. Many described the process of working with Grants Officers, respective contractors and architects to be very straightforward.

5.7   Several applicants, had found the project relatively simplistic and enjoyable to work on in comparison with other large scale grant programmes (e.g. Heritage Lottery Fund programmes):

> *"Impressed by it (the scheme) all the way through…the easiest, least bureaucratic and sympathetic means of achieving grant support"*

> *"The best application form I've seen. The easiest and most straight forward compared to other lottery grant forms. It was quite refreshing."*

6.   LEARNING POINTS

Challenges faced by Grantees

6.1   The consultation with both grant recipients and delivery staff revealed a number of key challenges, often dependent on the existing experience of the applicant, but also in relation to processes in place within the programme. Common challenges faced by grantees are discussed below under the following broad themes:

- Timescales for completing applications;

- Length of the application form;

- Use of IT systems;

- Unforeseen challenges (e.g. weather, delays gaining permissions);

- Reporting requirements;

- Spread of payments; and

- Reclaiming VAT payments.

6.2   Whilst the dedicated response of the Grants Officers worked effectively to mitigate particular challenges, the findings reveal a number of key lessons that could be learned from the programme.

The Timescales for Application Completion

6.3   The majority of Round 1 applicants found the timescales for completing programme applications particularly difficult. Many had only become aware of the RRF during December 2014 and had a maximum of five weeks to complete the application over the Christmas period with submission to be made by the end of January 2015. Some respondents had as little as two or three weeks. These timescales had proved a significant challenge:

"The timescale was a problem. We were alerted (to the grant) by the Church of Scotland and we only had 6 weeks including Xmas and New Year. This cost us most dearly and our original estimate was way out. We could have spent longer finding out about the main problem with the roof."

6.4   Other respondents questioned whether the timescales had deterred certain POWs from applying:

"The timing was very challenging but this played into our hands as we were so prepared."

"If we hadn't got our act together we'd have never made the date, other churches may have been a similar position (to our church) and wouldn't have applied."
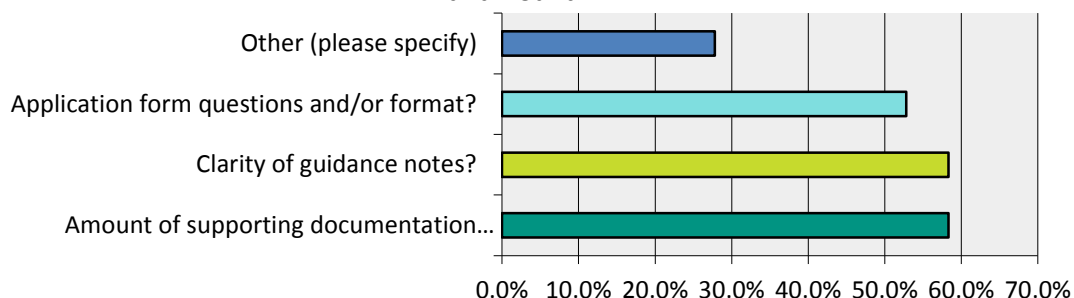
6.5   Many applicants felt that the process would be difficult for smaller, rural POWs with a smaller pool of volunteers to complete the application requirements. A minority felt that a greater degree of flexibility in administering grants might have been considered, particularly as a number of individuals were volunteering their time on the project.

6.6   During Round 2, the application timescales were extended to three months, which proved much less of an issue. However, some applicants considered that the timing was not helpful for projects involving capital work, as it meant undertaking physical works progressing into the autumn and winter and potentially missing the survey window for bat analysis.

The Length of the Application

6.7   Multiple applicants across both rounds considered that the application forms might have been shortened. Several believed that the amount of paperwork was not always proportionate to the amount of funding applied for and some applicants therefore viewed the process as unnecessarily complex and longwinded. One project stated they would not have been able to fulfil all of the application requirements within the timeframe had they not developed an earlier outline for an unsuccessful HLF bid.

6.8   However, many of the successful Round 2 applicants had previously applied to the RRF in Round 1 (66% were previous applicants), and a number of those re-applying had recognised the improvements that had been made to the application forms as illustrated below in Figure 1:

Figure 1: Did you Find the Process to have Improved Between Round 1 and Round 2

6.9   For example, over half of the respondents felt that improvements had been made to the amount of supporting documentation required (58%) and over half also felt that improvements had been made to the application form questions and format (53%). However, some respondents also cited some further improvements that could be made:

▪   More answer space was required for some complex questions to allow applicants to provide a more detailed response;

▪   The application process was demanding for applicants with little experience of grant funded projects. One grantee mentioned *"the input required was in prose, not in multiple choice style questions. 400 words for you to say what you want to say. This was a daunting task – not for the faint hearted. Wonder if there's a special type of person who knows how to fill out the form. I'm just a church warden"*

6.10   Despite the concerns raised over the application length, many grantees had understood the requirements for a detailed process to ensure that public funding was prioritised effectively.

The Use of IT Systems

6.11   One of the key challenges identified during Round 1 had been the use of IT systems. During the application phase, a high proportion had faced challenges working through the online IT systems, which had proved particularly difficult for applicants with lower IT skills:

"I'm in my senior years and not very adept with computers"

"I'm an oldie who's come to computers late. Using the computer was tricky"

6.12   This lack of IT capability meant that significant numbers of applicants were contacting Grants Officers with queries during both application and delivery stages. Although Grants Officers had provided resources to navigate through these systems, this area had remained a challenge for many.

6.13   Grants Officers also recognised that there had been a number of issues with the online IT systems in place during Round 1. The short time frames available to set up and launch the RRF programme meant there had been limited opportunity to fully test the IT system. Particular issues included:

- Difficulties completing and balancing finance tables;

- Difficulties completing permission to start forms and payment submission forms;

- Logging into the portal;

- Uploading attachments and photographs (due to small file size limit);

- Inability to navigate forward and backwards in the application form; and

- Inability to print off the Project Request Form to see in advance what information was required.

6.14   As a result of these challenges it had been necessary to review the IT systems, to ensure these worked appropriately and were more 'user friendly' and accessible for applicants.

6.15   In contrast, under a fifth of all Round2 applicants (16%) had found difficulties with the online portal. Perhaps this low percentage reflects the effort applied to simplifying the process between the rounds.

Unforeseen Challenges

6.16   A variety of unforeseen challenges and delays emerged during project works and while risks were identified at the application stage, many projects had faced unanticipated difficulties. Understanding these issues may support with unearthing some of the key lessons for the fund.

6.17   During the application phase it had proved difficult for a number of applicants to obtain cost estimates from contractors without the guarantee of work in place. Due to the limited timeframes for applications, POWs had to include those estimates that the architect believed to be reasonable. However, for a number of projects these estimates proved inaccurate due to additional, unforeseen works that were required as the project progressed.

6.18   Grant recipients expressed that more accurate financial estimates might have been developed at the outset if the timescales for application were lengthened. Respondents felt that the system might have provided a bigger margin for error for cost estimates and perhaps more support with developing a cash flow and financial forecast at application.

6.19   Despite these challenges, a number of recipients successfully increased their project grant size via the NHMF contingency budget through the support of Grants Officers.

6.20   In some instances, the weather had adversely affected project delivery. Certain materials could not be used during cold weather periods and sites had to be weather proofed at all times. The wet and/or cold seasonal weather had also delayed repair works as it was not always possible for contractors to access roofs. In many cases contractors did not want to begin work until the spring, when there was less chance of wet or frosty conditions.

6.21   For some POW's in Round 1 there were also delays during the summer months. A high volume of weddings took place across many churches in the summer. Due to the significant income this provided, a small number of grantees were concerned that the repair works could be disruptive. Similarly, for churches that relied on seasonal tourism for income generation, there were concerns that visitors may be deterred by the presence of scaffolding, which also contributed to work delays.

6.22   In addition, for many grant recipients one of the key challenges has been the incurred costs and the delays resulting from specialist surveys taking place (including bat surveys). If bats were present, mitigation measures had to be undertaken and certain repair works could only be completed between October and March (during the migration season).

6.23   The stipulation that repairs had to be undertaken using 'like for like' replacements for traditional materials also led to unforeseen delays for a number of POWs. The application guidance stated that:

'*We are only likely to give you a grant if your project involves like-for-like repairs, retaining as much of the original material as possible and only replacing original material where it has reached the end of its useful life and/or where it cannot reasonably be economically repaired. In exceptional circumstances we may consider the use of an alternative repair material if a strong case can be made for its use and where you can demonstrate the support of the relevant ecclesiastical or statutory permission body'.*

6.24   Delays were encountered in some areas due to time taken to source specialist materials, and the skills and craftsmanship required for the repairs. A number of respondents highlighted that the likelihood of extended timescales involved in working with 'like for like' materials, rather than contemporary alternatives, could be made clear to grantees at the outset to assist with more accurate estimations. However, the guidance cited in the previous paragraphs explains the project parameters for this.

6.25   Consultation also revealed the limited number of contractors and specialist or professional advisors with the expertise to undertake works on listed buildings. This contributed to further delays; for example, one respondent reported on a lack of conservation architects operating nearby, which meant they had needed to source an expert from outside the local area. For another project, works hadn't taken place for several months because the architect was busy working on repairs with other POWs.

6.26   Feedback also revealed that the timing of the programme may have contributed to certain delays. Grant approvals in Round 2 were not received until the summer months, which meant that once grantees had completed the 'permission to start' process, the autumn and winter months were approaching.

6.27   As a result, some of the Round 2 projects were delayed due to adverse weather conditions, and some works could not be carried out until temperatures improved and conditions were drier due to the specific materials in use. If the programme had been open for application at a different time of year, there may have been fewer delays due to poor weather conditions.

6.28   A minority of projects reported issues of lead theft, which resulted in additional costs for replacing materials. As a result, these construction sites were made fully secure at all times and one grantee commented on the additional costs for setting up appropriate CCTV monitoring.

6.29   While these issues evolved outside of the available support through the programme, the projects had been dealt with sympathetically and flexibly by Grants Officers.

The Completion of Reporting Forms

6.30   A process of quality assurance was undertaken with all grantees through NHMF during Round 1 of the programme. Grantees were required to upload a number of key documents onto the GEMs database, including the signed permission to start form, the specification form, invoices, and progress reports.

6.31   During Round 1, a number of projects faced challenges compiling the information required for the permission to start process and the grant payments due to the volume of forms and paperwork required and the short deadlines in place. Several Grants Officers also recognised these challenges:

"Some projects felt quite overwhelmed with the number of documents required and it proved in some cases very time consuming to apply for faculty permissions from the Diocese."

6.32   For some grantees, the permission to start process took six months to work through, which for Church of England POWs included a requirement to secure Faculty permission. For Round 2 projects, the most common challenge to completing application forms had been 'obtaining the relevant permissions' (48% of respondents). Respondents also found the structure of the forms complex to complete. During the application process specific detail was required on the works to be carried out, whereas on the permission to start form projects were only required to provide the overall costings for general building works. For one project it proved challenging to separate the costings on the permission to start forms for the different areas of work along with the equipment and materials.

6.33   A number of Church of England projects also reflected on the long process of obtaining Faculty permission, which also contributed to work delays. Some projects would have welcomed advice from Grants Officers on when to apply for permission and questioned whether they may have compiled information during the application assessment, rather than awaiting the grant award date.

6.34   Despite the detailed nature of the reporting forms, grant recipients had understood what was required to meet the terms of the grant agreement in terms of reporting deadlines, financial/spend, forecasting, procurement, and publicity.

Spread of Payments

6.35 The spread of payments had been revised between Rounds 1 and 2. In Round 1, projects received 50%, then 40% and a final 10% of the fund allocation at the start, middle and end of their project.

6.36 A number of Round 1 projects had found the spread of NHMF grant payments adequate to support the development of the project works, while for other Grantees this had presented cash flow issues. There were particular challenges for projects that needed to make substantial payments to contractors on a monthly basis.

6.37 Other projects had faced issues with cash flow due to a particular reliance on the grant instalments, and a very small number had needed to take interim loans. Another grantee had a 2.5% payment retention in place on a contractor, whereas RRF had a 10% payment retention on grantees. The grantee felt it may have been helpful if the payment retention was also 2.5%. Other projects felt they might have faced issues with cash flow if they had fewer liquid assets and had been particularly reliant on regular grant instalments.

6.38 In Round 2 the spread of funding instalments was altered to 70%, followed by 20% and a final 10%. It was intended this model would improve cash flow for recipients and the majority of respondents (79%) found this approach to be either 'good' (56%) or 'excellent' (23%) when managing their projects:

"The spread of payments worked well and ensured that contractors could be paid on time. Payments were issued promptly by the NHMF once applications had been made and the process was straightforward throughout."

Challenges Reclaiming VAT

6.39 A number of Round 1 projects also reflected on the challenge of reclaiming VAT payments. While it is acknowledged that this issue did not result from RRF processes, awaiting repayments created short term cash flow issues for several projects. To access VAT repayments, projects were required to apply to a separate body based in Glasgow. In many cases it took between six and eight weeks to access VAT grant payments, which left some projects cash poor in the short term and proved challenging when grantees were required to make payment to contractors:

"Grantees were only able to claim on invoices received. However, grantees had to pay the invoices including VAT. This posed an issue from one Grantee that did not have the available cash flow or reserves in place to make the additional VAT payment at that particular stage. Fortunately, the Grantees managed to delay the builder's payments. However, if VAT was paid to projects at the same time as the grant, this would have been far more straightforward, without contributing to issues with cash flow and delays to the contractor's payments."

6.40 Whilst Grants Officers offered reminders to grantees to contact the VAT reclaim body, several grantees felt that there may have been value in making projects aware of the delays to repayments within permission to start guidance to support with cash flow management.

6.41 Furthermore, it may have also been valuable for the systems to allow for more than one named person to complete the re-payment forms (in case of illness/annual leave etc.).

Feedback for Unsuccessful Round 1 applicants

6.42   Two thirds of Round 2 grantees had also applied to the fund in round 1 (66%). Grantees who had applied in Round 1 were asked to rate the quality of the feedback following notification that they had been unsuccessful. The response was mixed. Just over half of the respondents felt that the feedback had been good (28%) or excellent (23%); providing an understanding for why their application had been unsuccessful and assisting with their second application. However, other grantees felt that the feedback had not been very detailed or tailored to their application and nearly a third of respondents had been either dissatisfied (23%) or very dissatisfied (8%) with the response

6.43   Unsuccessful applicants were notified either by post or email and more detailed feedback was available via telephone conversations with Grants Officers. Whilst the programme had accommodated feedback requests, it had not been possible for Grants Officers to proactively approach unsuccessful applicants to provide feedback due to the high numbers of applications and the pressures on staff resources during Round 1. Following Round 1, some applicants mentioned that they had been encouraged by the Grants Officers to reapply to the fund.

6.44   However, during Round 2 all unsuccessful applicants were advised to request feedback. They were advised that the process might take a few weeks due to the volume of requests and also because the Grants Officers were out of the office delivering Permission to Start Workshops. Grants Officers provided feedback to approximately 400 unsuccessful grantees across the programme.

6.45   Feedback processes could be improved for future programmes by ensuring that resources are available to adequately respond to high volumes of unsuccessful applicants.

Challenges faced by NHMF

6.46   The Grants Officers also reported on the challenges faced in their role during Round 1. Several Grants Officers reflected on the significant support required by applicants, which placed substantial demands on their time.

6.47   This was particularly the case during the application phase due to the high volume of applications and the challenges faced by prospective grantees working through this process. Throughout the application and assessment stages of Round 1, only three Grants Officers were contactable by phone. The Grant Officers were inundated with calls during the application process and the progression of project works. Moreover, following receipt of applications, Grants Officers had a short window of time (four to six weeks) to review the documentation and offer recommendations to the award panel. However, following the awarding of Round 1 grants, a permanent team of six staff, including five Grants Officers and one Programme Manager, were appointed to manage the successful applicants.

6.48   During Round 2, some of the initial challenges were resolved as additional staff members were allocated to monitor projects. An additional five members of staff (two permanent and three temporary) were appointed to support with the assessment of projects. Once the assessment was complete the three temporary staff left the team and the remaining seven Grants Officers managed the monitoring case load. However, all Grants Officers still reported a large caseload to work with.

6.49   The provision of improved grantee guidance, during both the application and delivery stages, along with the introduction of 'permission to start workshops' significantly reduced the volume of calls and queries that Grants Officers received.   While Grants Officers still reported periods of increased demands on their time, especially at the time of submission deadlines, they appreciated that this was part of their role.

7. OUTCOMES AND IMPACTS

Introduction

7.1 The outcomes and impacts of the RRF programme are detailed in this section. This includes impacts arising for grantees (both direct and indirect impacts) as well as outcomes and impacts experienced by NHMF.

7.2 These findings are based on Round 1 and Round 2 grant recipient responses to the consultation. For many Round 2 respondents it was too early in the project timeline to speak to any impact the funding has had, therefore findings most closely reflect the experience of Round 1 respondents, for whom impacts have had more time to materialise. Based on the evidence available it can be noted that where Round 2 respondents did report outcomes and impacts that these were broadly similar.

7.3 Headline findings for the programme in terms of outcomes and impacts include:

- The funding has fulfilled its primary objective to ensure LPOWs were able to improve the condition of their building and render it watertight;

- Outcomes and impacts reported by grantees were consistent across regions, grant size, faith, and denomination;

- The evidence is clear that the funding has also enabled a series of wider and unintended outcomes and impacts. These primarily included a range of community impacts as well as ability to undertake additional repairs to the LPOW.

Progress against Fund Objectives

7.4 It is clear that the RRF Programme has achieved its primary objective, and has successfully administered funding to allow LPOWs to carry out urgent repairs in order to render buildings watertight. The vast majority of LPOWs reported their building to be both **watertight and weatherproof** following completion of the repairs undertaken.

"I would like to express my gratitude to the fund for its support. Without this we would have had no prospect of carrying out these initial repairs and our church would have become increasingly dilapidated and ultimately unsafe"

7.5 Furthermore, respondent feedback indicated immediate success (water ingress having stopped) as well as a predicted longevity of the repairs undertaken; respondents indicated that buildings were now in a good condition for 'future generations' and mentioned that repairs were dealt with for the foreseeable future (the next "50-100 years"). A **legacy or long-term benefit** was therefore associated with completion beyond the immediate timescale.

7.6 It is clear from feedback that repairs have **prevented further deterioration** which would have worsened the LPOWs' situations, both in terms of the extent of the repairs needed (and increase in associated future costs) as well as implications on the usability of the building.

7.7 Furthermore, the **'timeliness' of the funding** was often mentioned by grantees, with some LPOWs stating that their buildings were dangerously close to closure prior to being awarded the grant. This is an indication that the funding has been successfully distributed to a number of POWs with an urgent and pressing need for assistance (as per the grant eligibility criteria).

"Without it the church would have closed. It's now open again. At Christmas we had over 500 people through the church with Carol services"

7.8 This, in turn, has resulted in time-savings for a number of grantees in terms of ongoing fundraising efforts. Further, the demand has confirmed how much a fund such as RRF was required and our research has revealed a continued need for funding amongst POWs requiring additional works to maintain and further improve the condition of the buildings.

Impact of the Absence of the RRF

7.9 Many respondents expressed their gratitude for the funding and described a **lack of alternative options for financing repairs** despite continued fundraising efforts; for example, a number of Quinquennial reports had identified necessary works which required local parishes to fund raise tens of thousands. Congregations for rural parishes (particularly Church of England) tended to be very small and some communities had little disposable income to donate. The following quotes illustrate the importance of the fund:

"The fund thankfully saved the building from deterioration that could have become very serious. It has removed a major fund raising burden which would have taken many years"

"(To attempt repairs) another 5 years down the line would have been financial disaster"

"If we hadn't had the grant we would still be scratching round trying to raise the money. It took away a great burden; you spend hours looking at these grant forms and jump through all the hoops…. Wonderful to have it"

"If it hadn't been for that money I genuinely would have no idea how we would have done it"

7.10 Although all repairs were deemed 'urgent' - defined as being necessary within a five year period for round 1 and a two year period for Round 2 - in some cases there was an imminent threat or danger as a result of the repair need, meaning that rooms were already closed off.

7.11 At the time of the consultation it had not been possible to quantify how many POWs were on the Heritage at Risk Register, as this was not known to the vast majority of respondents. For projects with a building on the Register, it would also take a period of time to determine whether this would be removed following the repairs.

7.12 A number of respondents detailed that the **use of the building would have been further constrained** without the support from the programme:

"Church would have closed without the grant. Part of the roof was near collapse. 710 anchor points had been lost"

"The meeting room is our one and only. From a charity point of view Christian Aid use the room for local group meetings. If it had continued we wouldn't have been able to continue that activity"

> *"The roof was in a dangerous state. We wouldn't have been able to fund replacement so we would have had a dangerous, unusable room"*

> *"Without it, the works would have been more of a challenge. Wouldn't have been able to address them to the same extent and ensure the long-term viability of building. We can now guarantee that for a number of decades going ahead. Hope the profit will be felt by people coming after us using the building"*

> *"Without this grant we would have been facing many years of work needing done to the roof. Doing it all at once will ensure that we have Church that will stand for many years and continue to be available to all in the community"*

7.13 Demonstrating that the outcomes evidenced would not have been possible to the same extent in the absence of the funding, grantees consistently expressed that further deterioration would have occurred and/or additional future work would have been needed if funding had not been made available through the RRF programme or at that specific time.

7.14 Furthermore, it was frequently mentioned that repairs undertaken further into the future would have proven more costly if left longer.

Wider and Unintended Outcomes

7.15 In addition to the successes demonstrated in achieving the RRF primary objectives, the grants have also led to a number of wider and unintended outcomes. These are outlined in more detail within the following section and include:

- **Wider community benefits:** increase in available space and/or funds available to undertake community activity as a result of grant funding, i.e. POWs were able to reallocate funds towards community activities which would otherwise have been allocated towards current or future repair works;

- **Ability to undertake additional repairs or improvements to the POW:** due to efficiencies occurring as a result of undertaking repairs simultaneously and/or due to reallocation of funds which would otherwise have been directed towards the urgent, larger-scale repairs funded by RRF;

- **Capacity-building:** learning and increased confidence as a result of being involved in the process of undertaking a grant-funded project.

Wider Community Benefits

7.16 Though the type of community benefits realised by grantees has varied, ***wider community benefits of some form were consistently cited across all regions/nations, faiths, denominations, and grant sizes***.

7.17 It is important to highlight the contribution which POWs already make to their communities. In addition, grantee responses suggest that POWs act as important community hubs within both rural and urban locations, demonstrating that community activities are central to the POWs function within their local areas.

7.18   For example, consultations revealed that a number of POWs surveyed undertake community engagement activities, from hosting external community organisations in their meeting room to directly delivering engagement activities.

7.19   These community activities comprise both religious and community services, with POW buildings therefore providing community benefits which extend beyond the provision of facilities for worship (though the value of this is also significant in its own right).

7.20   Our research indicates that the RRF has enabled grantees to either *safeguard or increase the community activities they offer*. The reasons for this are two-fold, i.e. either due to: the space being suitable to accommodate such activities (e.g. a meeting space which is now able to be used or continue being used for community activities as a result of repairs); and/or community activities are able to be increased due to the reallocation of funding which would have otherwise been spent on repair work or would have been retained within POW accounts until fundraising targets were able to be met.

> *"The programme has provided a large boost to local congregations and communities with some now thinking of moving on to support larger projects. A number of buildings have become community hubs for places of worship and other activities within the community"*

7.21   One grant recipient responsible for a POW within an area of deprivation stressed that it is very important that they were able to sustain local services and social work activities provided locally, by ensuring the *building was kept warm and dry for this purpose*. Further, another grantee reported that the local community centre had to close due to a problem with asbestos, and that the POW was filling the shortfall in community services which resulted. A food bank is also based within this POW.

7.22   Whilst applicants didn't have to demonstrate community commitment to the application, it is evident that the grants have also energised a number of churches into seeing how their premises can be used to a greater extent as an important community resource. A number of grantees, spurred on by the works undertaken, were also considering *future avenues for expansion of their community offer*, either through renovation of additional areas within the POW and/or as a result of having freed up resources (time and funds) which could instead be concentrated in pursuit of such objectives. For example, one POW was able to re-work the electrics within the building due to completion of repairs and has freed-up two additional rooms for community use.

7.23   Taken together, feedback indicates that community engagement activities can be considered wide-ranging and, extending to heritage projects, community events, and additional activities which bring religious and non-religious communities together.

7.24   A number of POWs have links and provide important services to local community organisations external to their own activities; for example, one respondent mentioned hosting an event for the Queen's 90th birthday which was considered a great success and involved a range of community members including local schools.

7.25   This was considered to have had a positive impact, with a number of events being hosted and an increase in footfall, demonstrating that *POWs are being used in new ways as a result of the support.*

"Makes it (the hall) more useable. We offer parts of premises for letting, hosting several community groups e.g. Foodcycle and Mencap, lunch club, community groups, AA, a refugee group, and Scouts use the premises. Looked as though it wouldn't happen, that's now safeguarded. Our international population is a major part of the church. We had 36 nationalities in the church last year. It's well-used"

"Activities may include mums and toddler groups, choirs, community groups and music groups. In all, 500 people per week pass through the building. The church would also like to set up a community history display through story boards within the building"

"Everybody in the church is thrilled about it. We are now a more open and engaging church with more groups in community using our resources. It's being utilised much more than we would have been able to do. New life brought into church. Everybody comments that it's a lovely place. Really positive experience"

"The grant generated the enthusiasm, and the group of people. Raised awareness of services. Had events we wouldn't have otherwise been able to e.g. for Queen's 90th birthday- and we received a letter from the Queen"

Community Cohesion

7.26   A number of indirect impacts were evidenced by grantees in terms of **softer and more intangible community outcomes** i.e. relating to positive shifts in attitude and/or a sense of 'bringing people together'. Firstly, it is important to note that a pre-existing level of community pride appears to have been evident across many of the POWs, though some respondents indicated that this confidence and enthusiasm had been waning prior to the grant reward due to the difficult and ongoing challenges associated with the urgent repairs needed.

7.27   Our research suggests that the RRF has not necessarily **created** this sense of pride, rather has allowed it to be sustained, broadened, or rekindled.

"Can't see us being able to raise that amount of money. It would have taken so long. (We were) beyond the point of no return. People were so devastated and they gave up. LPOW had faith in them; 'if we give you this money as you can build a good church in this community'. It wasn't just the money itself… it was the fact someone outside said 'you're worth investing in'"

7.28   Particularly within rural areas, feedback indicates that POWs are often considered to be central to village life, with the buildings' significance thought to be appreciated even by those who do not regularly attend worship or engage in a religious capacity.

7.29   A number of respondents felt the RRF has created **additional interest in the POW** and its use within the community, with positive feedback having been received by those outside of the POWs immediate congregations. Some grant recipients expressed that the project had **raised the profile** of the POW through the 'visibility' of the work being undertaken and, in limited cases, through publicity e.g. mentions in the local press.

7.30 There is a strong sense that the ***momentum generated*** through the projects has given communities something positive to cohere around, and that this has 'brought people together'. Responses indicate that the imminent threats to the POW and extended fundraising efforts were weighing on congregations and that the funding has provided a ***much-needed boost***; for example, grantees expressed that 'a weight has been lifted', that the funding had 'boosted morale', 'took away a great burden', and that previously 'people had given up'.

7.31 A number of responses to our consultation indicate that this 'positive feeling' may also have translated into a greater willingness and motivation to proactively support the POW, demonstrating increased community engagement:

"Community are much more aware that the church needed support so more willing to get involved"

"It always helps to have a specific project. Motivated and enhanced the wider community and church family"

"Things are happening. People have got ideas"

"The funding restores people's faith in the ability to actually do things"

7.32 One project highlighted that a Community Steering Group had been set up to support the project and mentioned that "the grant generated the enthusiasm, and group of people". This momentum has extended beyond the timeline of the project and has generated a number of additional events and projects whereby the community is working together more closely.

7.33 As a further example, following the repair works, one synagogue ran a number of sessions with other places of worship tackling racism and religious hatred. There are links in place with other faiths and a number of schools engage with the Synagogue.

Heritage & Tourism Value

7.34 Although cited less often, a minority of grantees were keen to draw attention to the ***heritage value*** of their POWs and the contribution of the funding towards ***preservation of local history and heritage for 'future generations'*** i.e. by safeguarding the building and protecting against future deterioration. One respondent mentioned that the church houses a number of paintings on the internal walls which are well-known and regarded, and had appeared in a list of 'Top 100 Church Treasures within Britain'; these paintings were considered to have previously been at risk.

7.35 In the short-term, aside from the intrinsic value of preserving heritage, a couple of grantees recognised potential for the repairs to lead to increased ***income-generation through cultural heritage tourism***. One respondent related that since completion of the repair works, the building has been visited by others outside of the local community, and another indicated that their POW was situated on the main 'tourist drag' and the improved condition of the POW therefore made a significant difference, improving the overall 'sense of place' for visitors.

Ability to Undertake Additional Repair Work

7.36 There were a number of routes to POWs being able to undertake additional works they could not/would not have otherwise carried out as a result of the RRF funding. These are detailed below and relate to works completed ***alongside project delivery***, as well as ***future planned works.***

7.37   A small number of respondents noted that the grant had 'freed up' finances that had/can be used to renovate other areas of the church which would have otherwise been allocated towards roof repair further down the line (and possibly at a stage where these essential repairs would have become more costly due to continued deterioration). If the RRF grant hadn't been available, this funding may not have been in place for additional renovation.

7.38   Firstly, some POWs were able to undertake additional repair works *simultaneously to RRF project delivery*. On occasions where this happened, some respondents mentioned that they were able to take advantage of the scaffolding necessary to undertake the RRF-funded repairs to carry out other works (funded by the POW). It was emphasised that scaffolding is in itself costly, therefore, this represents a *significant cost saving* (i.e. not having to pay for scaffolding at an another time, as well as being able to undertake other repairs to prevent further deterioration and more costly repairs at a later date). This also demonstrates that some additional repairs were carried out which may not have otherwise been possible due to financial constraints.

7.39   A minority of grant recipients also mentioned efficiencies arising from having enough funding to complete the roof repair 'in one go' rather than in separate stages, or having to spend money to undertake temporary repairs. One respondent mentioned that the opportunity to undertake other repairs at same time avoided lengthy tendering process further down the line, meaning that time savings were also realised. Undertaking repairs in one go represented better value for money.

7.40   In terms of *future and/or ongoing repair works,* for a small number of POWs the work undertaken through RRF constituted an early stage of a longer phase of forthcoming or planned repairs. In some cases, for example, *additional applications were underway for funding* (via other funding bodies) to undertake additional works. In other cases, works were planned using existing church funds which would have otherwise needed to have been allocated towards the urgent repairs covered by RRF.

7.41   The types of work POWs plan to undertake following completion of the RRF project include redecoration or modernisation, such as the addition of kitchen, toilet facilities, and/or the *improvement of accessibility*. In the case of the latter, POWs indicated that accessibility was very important to them but developments in this area had not previously been possible due to the need to save funds towards urgent repairs. The ability to concentrate on accessibility may support POWs to operate more inclusively.

7.42   In addition, there are examples of the momentum generated through the project having encouraged POWs to be more proactive in pursuing improvements to the POW over and above the 'essential' repairs. RRF has therefore been a catalyst for further investment and improvement.

Capacity Building of Grantees

7.43   Earlier in this report we covered how the capability of project leads impacted upon applying for and delivering a successful project. Evidence suggests that in some cases, the *skills, capabilities, and confidence of grantees has increased* as a result of managing the RRF project (from application through to delivery) and the experience of RRF had given them the confidence, and increased the likelihood of them applying for further funding from alternative sources in the future.

7.44   As a new development within Round 2 of delivery, there is also evidence of a small number of previously successful **applicants supporting other POWs** to put together their applications for Round 2. Some projects were also invited to share their experiences during workshops held by NHMF at the start of Round 2.

7.45   Grants Officers also suggested that the process has increased grantees' knowledge of other available sources of funding, as well as encouraging them to be more mindful and increase their awareness of ongoing maintenance requirements, which is felt by Grants Officers to support the longevity of repairs undertaken.

Benefits to NHMF

7.46   Aside from outcomes to grantees, outcomes arising for NHMF as a result of administering the funding were also considered during consultation with Grants Officers and the wider Programme Team. A number of benefits were highlighted and these are detailed below.

7.47   Project staff have **increased their skills and knowledge** as a result of involvement in administering the programme. For example, Grants Officers have developed specialist skills and expertise in buildings conservation terminology and procedures, as well as an in-depth knowledge of ecclesiastical processes. One Grants Officer responsible for supporting Scottish grantees noted that they have developed knowledge of procedures and terminology within the Church of Scotland. It is important that this knowledge is retained / expanded, particularly as there is a risk that insights could be lost due to specific Grants Officers not undertaking work within the same regions in the future.

7.48   Overall, administering the funding is considered to have been both a new and positive experience for NHMF, and opportunity to demonstrate its capacity and adaptability. The model employed for the RRF programme is considered by the internal team to represent **best practice for running similar schemes** and for 'getting money out of the door' efficiently and effectively. It is suggested that the RRF will act as a useful template for other similar or related schemes in future, "particularly those which need to be administered at relatively short notice".

7.49   It is considered that the success in administering the funding also contributes positively towards **NHMF's reputation** as a reliable and competent distributor of public funds. Public press releases are also considered to have made a positive contribution in this area.

7.50   Further, NHMF has demonstrated its ability to implement continuous learning to positive effect.

8. LESSONS LEARNT AND RECOMMENDATIONS

Introduction

8.1   There are a number of areas in which the programme has worked very successfully and the positive experience of the grantees also points to its effective delivery. There were no identifiable differences in the level of service or the experiences from grantees across different denominations and geographical areas, which shows that a uniform and fair approach has been adopted.

Project Successes

The Timing of the Fund

8.2   Many POWs expressed gratitude for the timeliness of the fund, as a significant number lacked the appropriate finances to cover repair costs. This proved a significant challenge to the majority of POWs, particularly for congregations of rural POWs (mainly of Church of England denomination), which tended to be very small. Some communities also had little disposable income to donate.

The Positive Experience of Grant Recipients and Applicants

8.3   The majority of grantees had been very positive about their experiences working on the project, even grantees with limited experience of working on similar projects. Many described working with NHMF, respective contractors, and architects as very straightforward. Also a number of grantees cited increased confidence and willingness to apply to other funds based on their positive experience with the RRF. For many grantees the repairs had been carried out as planned in their application. Moreover, the vast majority recognised that any issues or challenges had been suitably addressed by the flexible approach of the Grants Officers.

The Ongoing Support of the Grants Officers

8.4   The dedication of the Grants Officers to support projects has been a major success of the fund. Applicants felt that the level of ongoing support and communication provided by Officers, both during the project application and project delivery, was invaluable.   A number of grant recipients also felt that the ongoing communication from Officers was particularly effective when a single point of contact was maintained.

8.5   Grants Officers also found that the site visits provided an opportunity to develop relationships with project leads, witness the good work that the fund was supporting, and understand first hand any issues that grantees were experiencing that might be less easily communicated via telephone.

The Value of Support from Professionals

8.6   For many grantees, the ongoing support from appointed architects and surveyors throughout the delivery of onsite works (and in some cases during the application phase), had been extremely valuable. Many relied on professional support for project management and supply of information that was required for monitoring purposes such as expenditure breakdowns, tender documents, condition surveys etc.

The Changes between Round 1 and Round 2

8.7 A number of improvements were made between Round 1 and Round 2 to address the challenges that arose for grantees and Grants Officers. These improvements included: increasing the length of the application process to three months; simplifying the application form and accompanying guidance; assigning a greater number of Grants Officer staff to manage the case load; and improving IT systems. Further improvements included changes to the payment schedule which reduced cash flow issues for grantees.

8.8 Workshops had also been introduced to support grantees through the permission to start phase, resulting in Grants Officers receiving fewer requests for assistance via telephone and e-mail compared with Round 1. The workshops also provided Officers with more time to efficiently monitor projects, process claims, and undertake site visits. Overall the feedback from attendees was very positive and many described the workshops as 'excellent' or 'very good' in the additional comments section of the feedback form; assisting with project delivery stages.

8.9 The ability of NMHF to implement learning (and to positive effect) across the lifetime of the programme can be considered a key achievement, and has contributed to effective delivery and improved grantee experience.

Lessons Learned

8.10 There are a number of lessons that might be considered for future NHMF programme delivery.

8.11 Crucially, there was also variation in the knowledge and skills between POW project delivery teams. The vast majority of projects were managed by retired volunteers and while the application and delivery stages were relatively straight forward for those with experience of project management or those who had worked on similar projects in their professional lives, for others, overseeing the projects had been challenging. For future programmes, it would be useful to gain an initial understanding as to applicant's levels of experience at the outsight, possibly by an expression of interest form. This may help the funding body to offer additional support to those that need it or to signpost to advice and support guides.

8.12 A number of projects had found difficulties collating the required financial details, especially without the assistance of a treasurer. For future programmes, it might be more straightforward for grantees to develop more accurate financial estimates if the timescales for applications are lengthened to some extent. Although inaccurate estimates did not significantly impact on delivery (a number of projects were able to increase their grant at a later stage), this may have assisted planning at a programme level and minimized resources required (on both sides) to implement adjustments.

8.13 A number of respondents felt that the provision of worked documentation examples (i.e. cash flow, maintenance plans etc.), would have been helpful. However, such documents were provided so the issue is more around awareness of their availability. While the application forms were simplified between rounds, grantees cited the need for additional improvements by shortening the length and making this less complex, especially for projects applying for smaller grants. For future programmes it might be useful to provide example templates of permission to start forms, to gain an understanding as to the level of information required at the appropriate stage. One respondent also felt an available list of *Frequently Asked Questions* might have been useful to address any ongoing issues or queries.

8.14   Several respondents had experienced problems with accessing VAT repayments. More guidance on recovering VAT and how to manage this recovery within project timelines may have been welcomed at the outset of the project and improved cash flow.

8.15   Respondents in Round 1 also felt that support might have been available through additional site visits from Grants Officers, to ensure they had a better understanding of 'on the ground' issues. This had already been implemented as part of Round 2. There was also interest in additional training and information on how to look after your building following the repair works.

8.16   The consultations also revealed that the timing of the programme may have contributed to delays. For example, approvals in Round 2 were not received until the summer months, which meant that once the 'permission to start' process was complete, the winter months were approaching. Had the application process been open at a different time of year, there might have been fewer delays resulting from weather conditions.   These issues could be considered in any future similar programme, to ensure that applicants are not deterred due to unrealistic timescales or foreseen issues during delivery.

8.17   Furthermore, there is clearly a demand for similar funded programmes to support LPOWs to undertake various types of repairs, maintenance, and/or renovations and any funding in this regard would be greatly appreciated.

Outcomes and Impacts

8.18   The programme has achieved its primary objective, having successfully administered funding to allow POWs to carry out urgent repairs in order to render buildings watertight and weatherproof. In addition a number of wider outcomes and impacts have been realised.

Community Benefits

8.19   One extremely positive aspect of the RRF has been the resulting wider outcomes and impacts across local communities. For Round 1, many grantees stated that the services and activities offered by POWs had now been safeguarded. The Grants Officers felt that the fund had played a key part in saving important listed buildings that would now be protected for another 100 years. Others stated that the works had raised the profile of POWs across communities, reigniting interest in the building.

8.20   Overall, feedback indicates that local communities (whether they were of faith or not) had been positive about the improvements to the listed buildings. The repair works have also retained levels of pride within communities, particularly in rural areas, where the POW is often regarded as central to village life.

8.21   Moreover, the grants have meant that more money was able to be 'freed-up' by the POW for community activities and engagement. Consultation revealed that POWs act as important community hubs within both rural and urban locations; for example, hosting external community organisations to deliver engagement activities. These community activities comprise both religious and community services, and the feedback indicates that the RRF has allowed grantees to safeguard or increase the activities they offer.

Additional Works

8.22   Many of the grantees were looking to undertake other projects to improve their POW once the roof repairs had been completed. For a small number of POWs, the repair work was an early stage of a longer phase of renovation works and a number of applications had been completed for additional works. Many projects were also fundraising. For a small number of respondents, the grant had also 'freed-up' finances for renovating other areas of the church which would have otherwise been allocated towards roof repair work.

Increased Confidence

8.23   The evidence also suggests that in some cases, the skills, capabilities, and confidence of grantees has increased as a result of managing the repair project (from application through to delivery). An unexpected outcome of the fund has been that recipients feel their experience has given them the confidence to seek additional grants for further projects.

Impacts for NHMF

8.24   Overall, administering the funding is considered to have been both a new and positive experience for NHMF, which has demonstrated the capacity and adaptability of the team. The RRF will act as a useful template for other similar or related schemes, particularly those which need to be administered at relatively short notice.

8.25   Staff members have increased their skills and knowledge; developing specialist skills and expertise in building conservation procedures and an in-depth knowledge of ecclesiastical processes.

8.26   Finally, the success in administering the funding may also contribute positively towards ***NHMF's reputation*** as a reliable and competent distributor of public funds.

ANNEX 1 – ROUND ONE INTERVIEW QUESTIONS

The Project

1. Can you tell me a bit about your project? Why did you apply for the grant? Why was the project needed? (i.e. weather damage, vandalism, degradation etc.)

2. How much funding did you apply for? Did you match it in any way?

3. Who managed the project including the application process, decision making and approval of changes (i.e. member of the congregation, individual within the parish, church architect)?

The Application Process

4. Did you encounter any barriers or difficulties completing the application? (i.e. necessary skills, on-line portals, cash flow etc.)

5. Did you receive any advice from either the funding body or another organisation during the application process?

6. Did you find the guidance that accompanied the application form useful? What are your thoughts regarding the online support that is available? (Were eligibility and definitions clear within the guidance?)

7. How long did you have to wait to find out if your application was successful? Were the timescales communicated to you upon application?

8. Do you feel that the application process could have been improved in any way (i.e. do you feel that more support could have been offered by NHMF)?

Project Delivery

9. What were the main challenges of project delivery (i.e. gaining permissions, bat licences, evidence of competitive tendering)?

10. Did any of the risks that you identified in your application come to fruition? If so what was your response, did you have enough funding to cover everything?

11. What did you think about the way the payments were spread across the project? (50% 40% 10%)

12. Did your project change over time? If so, how and why? Was it effectively managed?

13. Did you receive any support from NHMF during project delivery? If so, how effective has the support been? What form did the support take? Is there anything that could be improved?

14. As a grant recipient, was it clear what you were required to do to meet the terms of the grant agreement (i.e. reporting deadlines, financial/spend forecasting, procurement, publicity)?

15. Do you think that the RRF could be improved in any way?

Outcomes and next steps

16. Has the project been completed?

17. Was the project effective in what it set out to achieve (i.e. make the building water tight, increasing the use of the building)?

18. Has the repair work had any wider community benefits (more services, increased use of the building for other community activities etc.)?

19. Has your building been removed from the Heritage at Risk Register? If not, what further works are required and how will you be financing that?

20. Any further comments?

Thank you so much for sparing the time to talk to us today.

ANNEX 2 – ROUND 2 E-SURVEY QUESTIONS

Your Project

1. Firstly, please include the name of your place of worship in the box below. This information will be recorded separately from your answers and all of your responses will be anonymous.

2. In which region is your place of worship located? (Please select from the drop-down menu below)

   East Midlands

   East of England

   London

   North West

   North East

   Northern Ireland

   Scotland

   South West

   Wales

   West Midlands

   Yorkshire and Humber

   Other (please specify)

3. Which faith denomination does your place of worship belong to?

   Baptist

   Non Conformist

   Church of England

   Roman Catholic

   Congregational

   Jewish

   Methodist

   United Reform Church

   Syro Malabar

   URC/Methodist

   Presbyterian

   Church of Ireland

   Non-Subscribing Presbyterian

   Evangelical

Episcopal

Church of Scotland

Free Church

Redundant

Pentecostal

Quaker

Church of Wales

Greek Orthodox

Adventist

Buddhist

Other (please specify)

4. What was you reason for applying to the fund? (Please select all that apply)

    Roof Repair (including coverings, Timbers, Ceilings and vaults

    Rainwater disposal systems (guttering etc.)

    Repointing of high level masonry

    Professional Fees

    Other (please specify)

5. What is your project status?

    Received an offer letter

    Received permission to start confirmation

    Project underway

    Project completed

6. How much grant assistance did you apply for?

    £10,000 - £25,000

    £25,001- £50,000

    £50,001 - £75,000

    £75,001 - £100,000

Match Funding

7. Did you match fund this in any way?

    Yes

    No

8. What was the value of the match funding and where was it sourced from?

The Application Process

9. Did you encounter any barriers or challenges to completing the application? (Please select all that apply)

   Necessary skills

   Difficulty with the online portal

   Cash flow

   Securing match funding

   Obtaining the relevant permissions (planning, bat surveys etc.)

   Lack of advice and support

   Other (please specify)

10. Did you receive any advice from either the funding body or another organisation during the application process? If so where did the support come from and how did it change your project?

11. On a scale of 1 - 5 (where "1" is "strongly disagree" and "5" is "strongly agree") how would you rate the following statements regarding the application process?

    The application guidance was clear and easy to understand

    The eligibility criteria was easy to follow

    It was clear what supporting documents were required for the application

    The online information was useful and informative

    Timescales for submissions and feedback were well communicated

    Communication with NHMF throughout the application process was effective

    Signposting to other support agencies was effective

Repeat Applications

12. Was this your first application to the LPOW Roof Repair Fund?

    Yes, this was my first application.

    No, I applied in Round 1.

13. On a scale of 1 to 5 (where "1" is "very dissatisfied" and "5" is "very satisfied"), how would you rate the quality of the feedback that you received following your Round 1 application?

14. Please briefly explain your answer to the above question.

15. Some amendments were made to the grant application process between Round 1 and Round 2. Did you find the process to have improved the second time around in relation to the following: (please tick all that apply)

    Amount of supporting documentation required?

    Clarity of guidance notes?

Application form questions and/or format?

Other (please specify)

16. Were you offered any additional support from NHMF to ensure a more successful application the second time around?

Project Delivery

17. On a scale of 1 - 5 (where "1" is "very poor" and "5" is "very good") how effective has the project support from the LPOW Roof Repair Fund Team been throughout the project delivery?

    Please briefly explain your answer:

18. On a scale of 1 - 5 (where "1" is "not at all clear" and "5" is "very clear") how would you rate the following Roof Repair Fund processes?

    Permission to start

    Financial monitoring

    Progress reporting

    Procurement guidelines

    Publicity guidelines

19. How did you find the spread of grant payments? i.e. 70%, 20%, 10%

    Excellent

    Good

    Acceptable

    Poor

    Very poor

Outcomes and Next Steps

20. Has the project been completed?

    Yes

    No

21. Thinking about the quality of the work carried out; are you / others involved with the project content with the work that has been carried out on your building?

22. Did you involve a qualified conservation architect in the project? If so how many days were they involved? Did you receive any advice from your diocesan advisory body?

23. So far, what have been the wider/longer term benefits of the project? (Please select all that apply)

    The building has been removed from the 'Heritage at Risk Register'

    More services are being held

Building conditions have been improved

More community gatherings are being held

Catalyst for further investment in the building

Other (please specify)

Finally....

24. Do you feel that the Roof Repair Fund could be improved in any way? If so, please describe.

25. Is there anything else you would like to share about your experience with the Roof Repair Fund?

Thank you very much for taking part in our survey.

We appreciate you taking the time to share your views.