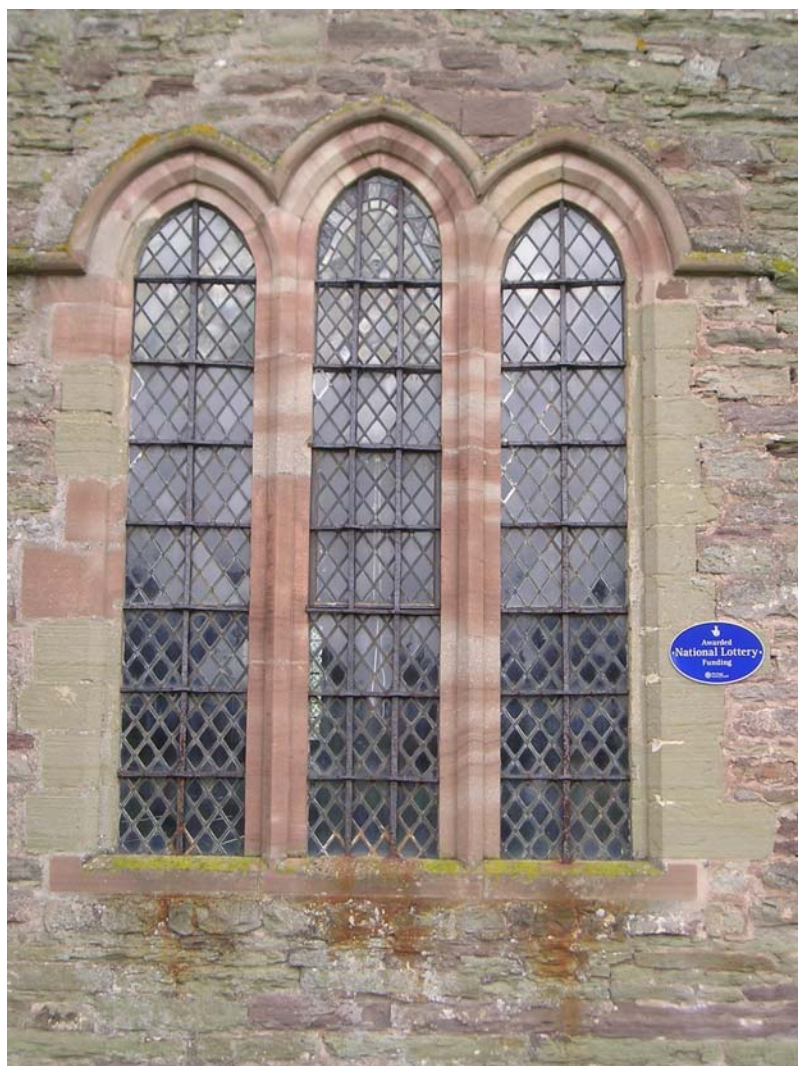


A Review of Heritage Lottery Fund/English Heritage Funding to Places of Worship 1996-2005



December 2005

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INTRODUCTION

1.0 Background to the review

- 1.2 The Heritage Lottery Fund (HLF) and English Heritage (EH) have been operating a joint scheme for funding works to places of worship in England since 1996. The scheme has taken three different forms, the details of which are set out herein. Throughout this time EH has funded only repairs to grade II* and I listed buildings but HLF has at different times varied the categories of work that it will support.
- 1.3 HLF and EH now wish to review their funding to places of worship in order to decide on future funding in England after the current arrangements for the joint scheme come to a close in 2007. In view of NHMF's responsibility for lottery distribution throughout the UK, recommendations relating to the delivery of funding for places of worship in England must also be considered for consistency of practice through the rest of the UK.

2.0 Aim of the review

- 2.1 The Architectural History Practice (AHP) has been commissioned by HLF to undertake a review of the joint schemes, to inform future funding strategies. The overall aim is to tell the story of the joint scheme from 1996-2005 and to assess its impact and effectiveness in order to make recommendations on future funding.

3.0 Structure of the review

- 3.1 There are four parts to the review. The first part documents the evolution of the different schemes, setting out in brief the rationale behind the changes made. It provides a picture of what has been funded under each scheme against the stated objectives.
- 3.2 The second part of the review seeks to identify what has worked well and what has not proved successful in meeting the stated objectives. Consideration is given to issues including increasing sector capacity, funding priorities, success rates, regulation of demand, and how these have been affected by delivery mechanisms. The benefits or disadvantages of the joint working arrangements to both organisations and to the applicants are considered, including the administrative and professional service provided by EH in delivering the scheme. In particular, the review seeks to answer the following questions:

Across all schemes: -

- How far have the schemes met the needs of the applicants and the heritage assets?
- How far did the schemes help manage demand and expectations?

Under the current scheme: -

- What levels of maintenance are being achieved and how could these be increased?
 - What levels of physical and intellectual access are being achieved and how could these be increased?
 - How far is the scheme succeeding in supporting the professionalism and capacity of those responsible for the upkeep of places of worship?
- 3.3 The third part of the review takes a step back to consider the bigger picture, with particular regard to recent research, funding and policy developments. It does not attempt to tackle the larger questions concerning the future of places of worship, but considers these developments in order to inform the recommendations.
- 3.4 The fourth part of the review makes recommendations about the future of HLF's funding for places of worship. In doing so, it seeks to answer the following questions: -
- In terms of the buildings, what would help most to make places of worship more frequently used and therefore more sustainable?
 - Should HLF expand the scope of what it will fund beyond urgent high level repairs?
 - If HLF were to expand the scope how should it prioritise and manage demand?
 - Does the sector have the capacity to respond to any widening of the scope?
 - Given the objectives, powers and regional structures of EH and HLF, what implications would expanding the scope have for the delivery and administration of the scheme?
- 3.5 Reference is made where appropriate to other relevant contextual material to inform whether the scheme is meeting the needs of the sector and how it might be improved. The way in which the current repair scheme operates in Scotland, Wales and Northern Ireland has helped in framing the recommendations.
- 3.6 The recommendations on the future of the joint scheme include evidence of need and demand for funding; size of grants; scope of works; grant conditions and improvements to joint working arrangements.

4.0 **Methodology**

4.1 The review is a desk-based study based on

- An analysis of internal HLF/EH documents and review of other relevant material;
- Analysis of data on the scheme provided by HLF/EH;
- Interviews with key staff at HLF (Judy Cligman, Stephen Johnson, Colin McLean, Jennifer Stewart, Kevin Baird)

- Interviews with key staff at EH (Richard Halsey, David Heath, Sally Embree, Guy Braithwaite, Tania Weston)
- Interviews with key experts and stakeholders, including:

James Blott (Director, Historic Churches Preservation Trust)
 Trevor Cooper (Author, *How do we keep our parish churches?*)
 Revd Maggie Durran (Historic Churches Project Officer, Diocese of London)
 Paula Griffiths and Becky Payne (Cathedral and Church Buildings Division, Archbishops' Council)
 Brigadier Adam Gurdon (Director, Open Churches Trust)
 Sharman Kadish (Director, Jewish Heritage UK)
 Matthew Saunders (HLF Trustee and Secretary, Ancient Monuments Society)
 Ian Sergeant (Conservation Officer, Methodist Church)
 Simon Thorrington (Financial Secretary, RC Diocese of Lancaster)
 Christopher Walton (Chairman, Oxfordshire Historic Churches Trust)

The author is grateful to all those who have helped with advice and providing information. However, any opinions expressed are his alone, as is responsibility for any errors.

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December 2005

PART ONE

EVOLUTION OF THE DIFFERENT SCHEMES

1.1.0 Introduction

- 1.1.1 State aid for the repair of historic churches was introduced in 1977, administered by the Historic Buildings Council (HBC) on behalf of the Department of the Environment. Following its creation in 1984, English Heritage (EH) took on this function from the HBC.
- 1.1.2 It should be stressed that only repairs and, to a lesser degree, conservation of contents, were eligible for grant aid under this scheme, and only to 'outstanding' buildings (which in England later came to be defined as buildings listed in grade I or II*). Smaller grants were also available from the Historic Churches Preservation Trust (founded in 1953) and from the various county churches trusts. In addition to this the Council for the Care of Churches (CCC) was able separately to fund conservation work on historic contents. These grant schemes went some way towards addressing the backlog of major repairs required for most historic places of worship, which typically had received little attention since their last major overhaul in the nineteenth century. They also helped significantly to hold back the tide of redundancies (a threat which had been highlighted by *Change and Decay: The future of our Churches*, a major exhibition held at the Victoria and Albert Museum in 1976). Whereas, according to figures provided by the Church Commissioners¹, 467 Anglican parish churches were closed for worship between 1974 and 1979, only 90 were closed between 1999 and 2003. At the peak of its grant-giving powers (1994-95) English Heritage offered £14.1m in grants to churches against 520 applications, a success rate of 86%.
- 1.1.3 However, it was always the case that even within the tight constraints under which the English Heritage scheme operated, demand for grant aid far exceeded the available budget. The *Churches Needs Survey* (carried out by EH and the CCC in 1994/95) suggested, on the basis of a sample of five areas, that (assuming a grant rate of 40%) the minimum annual grant needed to assist the repair of grade I and II* Church of England churches alone was £20m, with a further £10m needed for grade II churches.
- 1.1.4 Recent years have seen an increased recognition of the fact that places of worship are no exception to the general rule that the preservation of historic buildings is best assured by their continuation in the use for the purpose for which they were built. However, closure of historic places of worship is not just undesirable for reasons of antiquarianism. Such buildings are the

¹ Report of the Church Commissioners Redundant Churches Committee 2003

repositories of the beliefs, family histories, craft skills and memories of often countless generations, and their conversion to alternative use, still more their removal from the landscape, represents an irreversible loss to the experience and memory of all, believers and unbelievers alike. For this reason, statutory, advisory and grant-making bodies have increasingly sought to help congregations in various ways to continue and extend the use of their building.

1.2.0 **Advent of the Lottery and handling of grants for places of worship 1993-1996**

1.2.1 The National Lottery Act of 1993 saw the establishment of the National Lottery in the United Kingdom. Various bodies were identified or established by Parliament to allocate grants to certain good causes; the Act identified the National Heritage Memorial Fund (NHMF) as the body to distribute money allotted to the heritage. In 1994 the Heritage Lottery Fund (HLF) was set up to support a wide range of projects involving the local, regional and national heritage of the United Kingdom. This was a non-departmental public body, reporting to Parliament through the Department of National Heritage, now Culture, Media and Sport. It is administered by the Trustees of NHMF, and is independent in its policy making and decisions.

1.2.2 HLF's remit was always intended to be much wider than that of English Heritage or its counterparts in Scotland, Wales and Northern Ireland. Indeed, great emphasis was laid on the principle that this funding was in addition to, rather than instead of existing government funding (the principle of 'additionality'). The three broad heritage aims of HLF (from 2002) are:

- To encourage more people to be involved in and make decisions about their heritage;
- To conserve and enhance the UK's diverse heritage; and
- To ensure that everyone can learn about, have access to and enjoy their heritage.²

Since 1994, HLF has had an enormous and positive impact in the conservation of the historic environment and in increasing public access to and enjoyment of the heritage. About £3 billion has been awarded to more than 15,000 projects across the UK. In 2005-06 alone it will allocate around £330 million to projects in England, Northern Ireland, Scotland and Wales.

1.2.3 It was no surprise that from the outset many congregations turned to HLF as a major new source of funding. While some denominations (such as, to start with, the Methodist Church) refused on principle to seek funding from what they saw as the proceeds of gambling, many others saw a golden opportunity. This new stream of funding was far less constrained by budgets and criteria than English Heritage's church grants scheme; churches of any grade (or indeed none) could apply, and not only for repairs; long-wished-

² *Broadening the Horizons of Heritage*, HLF Strategic Plan 2002-07 p.5

for new facilities might also attract grant aid. Many congregations unable to benefit from English Heritage's grants, and many who were able but who had not succeeded, or needed more, approached HLF for funding. Over 150 applications were received by HLF in the first half of 1995 alone. It was clear that there was a considerable unmet demand for funding, and was equally clear that HLF would need to define clearly what kinds of projects it would support if it was not to be overwhelmed.

1.2.4 HLF therefore prepared a guidance note on church projects³ (the more inclusive term 'places of worship' was not then in general currency). This note was first publicly circulated at the annual conference of the CCC in September 1995, and made clear that

- Works to grade I and II* churches were not a priority, unless they were ineligible for EH grant (the principle of additionality)
- HLF was able to consider applications relating to grade II churches, which were not generally eligible for EH funding. Priority would be given to urgent repair works and to works aimed at conserving the historical character of a church or its contents.
- HLF was able to help with the conservation of historic bells and organs, both ineligible for EH grants.
- Liturgical re-ordering would not be considered unless there was a clear heritage benefit.
- New facilities such as lavatories or catering space might be considered if it could be demonstrated that the works were *essential* to secure the continued use of the church as a place of worship, by extending community use, and provided they involved 'minimum acceptable impact' on the fabric and character of the church.
- Projects to improve public access and appreciation of a church would be considered where sympathetic to the historical integrity of the building.
- Re-wiring, heating and lighting were not a high priority and would only be considered where the existing systems posed a threat to the fabric or were damaging to the appearance of the church.
- HLF was not able to support completely new works, such as church extensions or new stained glass windows;
- Projects costing less than £10,000 would not normally be supported;
- Grants could not be made retrospectively for work already in hand.

English Heritage would normally act as HLF's specialist adviser on applications relating to historic churches, and each application would be assessed by NHMF's Expert Panel on Churches, which would make recommendations to the Trustees. Applicants were advised that the whole

³ Heritage Lottery Fund: *Guidance on Church Projects* August 1995

process from application to decision would take five months. In the event of an offer, work could not start until a contract had been signed (in addition to gaining the necessary consents).

- 1.2.5 Even with this clarification, the administrative arrangements were hardly ideal. It was also clear that, notwithstanding difficulties over additionality, NHMF Trustees were not content to pick up the lesser churches, while English Heritage continued to support the jewels in the ecclesiastical crown. The paper that went to the CCC conference hinted at future change:

‘The scope for our assistance cannot be identified until you have applied to English Heritage, and it is likely that they will be able to advise you of cases where an application to us may be appropriate. The NHMF is currently discussing with English Heritage ways in which the Heritage Lottery Fund might be able to become more involved in supporting structural repairs to outstanding churches and we hope to announce proposals early in 1996.’⁴

1.3.0 **THE JOINT SCHEME FOR CHURCHES AND OTHER PLACES OF WORSHIP 1996-99**

- 1.3.1 It was clear from the outset that having two organisations operating separate grant schemes for places of worship, to different criteria and priorities, while one body acted as expert adviser to the other, was a recipe for complication, confusion and delay. It was not administratively convenient to either HLF or to EH, and it was certainly not readily understandable to the congregations wrestling with repair and maintenance responsibilities.
- 1.3.2 The Joint Scheme for Churches and other Places of Worship, launched at Christ Church Spitalfields on 17 October 1996, sought to remedy these problems, whilst not seeking to limit the kind of projects that HLF had outlined as its priorities for support in 1995. In the words of the joint press release issued at the time: ‘Instead of two parallel grant schemes, there will be one simple assessment procedure which will eliminate bureaucracy, confusion and delay and tailor funds to work of greatest need’. EH would administer the scheme on behalf of HLF. £20m would be made available in the first year of the programme, with each organisation contributing £10m. This was more money than had ever been made available for places of worship. However, it was only £5.9m more than EH alone had offered in 1994/95, and the criteria for eligibility had now been hugely widened.
- 1.3.3 In May 1996, that is before the launch of the joint scheme, the Secretary of State for National Heritage clarified her Department’s thinking about the principle of additionality. In her evidence to the National Heritage Select Committee on the National Lottery she said that: ‘Rather than restricting Lottery spending to projects which were never funded from government funds, it was possible to allow funding for projects in sectors where government funds were insufficient’. It was clear that funding for places of worship was inadequate, and this allowed HLF to support churches which

⁴ *ibid*

hitherto had been eligible only for funding from EH. However before HLF could offer grants for a project eligible under EH criteria, EH had to demonstrate that its budget was already spent, or could not run to supporting that project.

1.3.4 Application packs for grants could be obtained either from EH or HLF, both organisations then centrally based in London. Applications were welcomed from all denominations and faiths. However the building had to be in use for worship; redundant churches were not eligible. Neither were Cathedrals; they were supported by a separate EH scheme. Projects under £10k were not normally considered. Churches had to be of significant historic interest – in effect, to be listed or at least in a conservation area. Community as well as heritage benefits would be taken into account. Repairs to bells and organs were eligible, new installations or new stained glass, memorials and works of art not. Financial need was a consideration, and partnership funding a requirement. Access was emphasised – a condition of grant would be that the church would be kept open in daylight hours or display a notice saying where a key may be obtained. Applicants were required to demonstrate their awareness of the need to provide access to as many as possible, including the disabled.

1.3.5 The **priorities** of the joint scheme were for structural repairs and the conservation of the church, its fittings and its historic setting, and *then* for works to enhance and facilitate use of the building. If urgent repairs were needed, grant would not be offered for anything else until such repairs had been carried out. New facilities e.g. lavatories and catering space might, in special circumstances, be considered if they were

- Essential to secure continued use as a place of worship, by extending its use to the wider community, and
- Involved minimal impact on fabric.

1.3.6 The *Technical Guide for Applicants* which was included in the application packs set out the principles of repair that should be followed. On new work it stated that this should be of high quality commensurate with the quality of earlier fabric. Historic fabric should be preserved and nothing lost without justification. Advice followed on how new services and structures could be introduced; the emphasis throughout being on historic fabric, rather than the broader identification of significance or character that might apply today.

1.3.7 The broadening of criteria, increase in funding and associated rise in expectations resulted in a tidal wave of applications. It had been expected that there might be 4-500 applications in the first year. In fact there were over 1000, seeking support for projects costing in excess of £170m against a budget of £20m. Parishes had been encouraged by all the hyperbole surrounding the launch to Think Big. Only one in six of the applications submitted was for projects over £250k, but these accounted for over 60% of overall demand.

1.3.8 Only one offer was made in the first financial year i.e. by 31 March 1997, while EH staff struggled to cope with an ever-growing in-tray of applications. By the end of November 1999 about £8m had been offered. At this time, EH was still using commissioned architects in private practice to report on church grant applications. They were busy monitoring existing programmes of grant aided repair, and were unable to meet the new demand for reports. Nine new full-time architects/surveyors were recruited, but this required European tendering and once appointed they needed to be trained. Equally, it was clear that EH did not necessarily have the expertise in certain areas such as bells and organs, and additional expert panels had to be created. EH had only one or two M&E engineers to deal with applications to renew or replace lighting and heating systems. There was a fundamental mismatch between what HLF and the scheme needed and what EH could at that time deliver. There were also delays brought about by the requirement that every offer had to be agreed by NHMF Trustees. By now the promise of a five month process from application to decision seemed wildly hopeful and unrealistic.

1.3.9 Just before Christmas in 1997 EH and the HLF wrote to all the counter-signatories (archdeacons and those with equivalent responsibilities in other denominations) setting out the problem. A tightening of criteria was set out to stem the immediate flow of applications: only works urgently necessary within two years (as against the five years stated in the application pack) would be considered. The letter continued: 'Proposals for new facilities also pose a particularly difficult problem for us'. The value of these was recognised, and EH and HLF advised that

'we shall be as sympathetic as possible to applications for (lavatory, kitchen and meeting space) facilities on a modest scale...where it can be demonstrated that they will lead to wider usage than that of the existing congregation alone. Applications for more ambitious proposals to adapt historic churches for wider community use can be given serious consideration only if there is no other similar venue within reach and the case can be made that the church faces imminent redundancy without them'.⁵

1.3.10 The letter was not universally welcomed. A response signed jointly by the Archdeacons of St Albans, Hertford and Bedford represented a widely-held view:

'We understand why it was that you had considerably larger numbers of applications than you had anticipated, though we have to say that we were not surprised by the level of response which you received. It appears to us unsurprising that this has occurred when there was no separation of (a) repairs to church fabric and (b) the improvement to buildings to enable their more efficient community use...Each needs to be considered, albeit separately'.

The letter concludes:

⁵ Letter to counter signatories from Oliver Pearcey, EH Director of Conservation and Stephen Johnson, HLF Director of Operations 22.12.1997

‘We are evidently expected to act as go-between between EH and the HLF and the parishes which have sought what now seems totally unrealistic levels of funding. We trust that we are not now going to be left to explain away the situation which it ought to have been possible to foresee when their expectations were aroused by your original guidance notes’.⁶

1.3.11 The letter to counter-signatories did however have some success in stemming the flow of applications. By May 1998 1,194 applications had been received, for works totalling over £186m. 450 of these had been determined, and the £20m set aside for 1997-98 offered. That left 750 undetermined offers outstanding as the scheme entered its second year, with new applications coming in all the time. It was decided that there was no alternative but to suspend the scheme, with immediate effect, until 1 April 1999. The only exception to the moratorium would be cases of real fabric emergency. A letter to archdeacons and counter signatories was sent out on 11 May 1998, bearing the signatures of the Chairmen of EH and HLF. EH staff then set about clearing the backlog, using the stricter criteria set out in December 1997.

1.4.0 **Review of the Joint Scheme 1998**

1.4.1 While the backlog was being cleared, thought was being given to the lessons learnt and the form that the successor joint scheme should take. That there should be a successor joint scheme never seems to have been seriously in doubt. It was clear that the revised criteria for the re-launched scheme would need to be more specific, and that some categories of work which were currently eligible would need to be excluded or at least heavily circumscribed.

1.4.2 At its meeting in July 1998 EH’s Cathedrals and Churches Advisory Committee (CCAC) considered the merits of annual application deadlines (as with Cathedral grants and EH Conservation Area Partnership Schemes) and batching of applications (as with HLF’s Urban Parks and Museum initiatives). However, it was considered that the sheer volume of anticipated demand would make unacceptable demands on staff at critical points.

1.4.3 In September 1998 a joint meeting was held between CCAC and HLF’s Places of Worship Advisory Committee (POWAC) to discuss proposed changes to the joint scheme. It was agreed that

- Abandoning a joint scheme was not a realistic or desirable option;
- The joint scheme could not be relaunched without major changes first being made;
- The revised scheme must meet the objectives of both organisations (including HLF’s revised criteria relating to

⁶ Response dated 15.1.1998, on EH file

meeting economic and social deprivation and ensuring a good regional spread of grants);

- Unless more money was made available, tighter criteria were essential, with a major emphasis on repairs;
- Annual themes were inadvisable, but there was limited scope for batching certain types of work (e.g. bells or organs);
- HLF should continue to fund grade I and II* as well as grade II churches.⁷

It was the view of English Heritage that the emphasis of the scheme should be on urgent high level repair. New facilities should be afforded low priority, considered by regional teams *after* allocations for major repair projects and grants for bells and organs had been concluded.

1.4.4 While English Heritage was content to give priority to urgent high level repairs in the relaunched scheme, HLF Trustees were less happy. While agreeing that the criteria needed to be tightened, they considered that ‘restricting grants to high level repairs would be to focus too narrowly on the conservation benefits without also engaging with a wider range of outcomes which are expected from the use of lottery funds.’⁸ Trustees had discussed the matter at their December meeting, and concluded that they wished ‘to limit the field of applicants by targeting grants on areas of deprivation, with the objective of supporting schemes which deliver a measure of social and community benefits as well as sustainable uses’⁹. They were looking at various indices of urban and rural deprivation as a possible filter for at least major schemes. Most importantly, they committed themselves to supporting the relaunched scheme at £10m per year for the next three years.

1.4.5 In the meantime, the backlog from scheme 1 was still being cleared. Out of a total of about 900 applications, just under 400 were requests for grant aid towards urgent high-level repairs, that is the category of works given priority as from December 1997. The total cost of work was estimated to be in excess of £30m. To meet this demand, the HLF increased its allocation to the scheme for the year 1998-99 from £10m to £14m, and EH its contribution from £10m to £12m.

1.5.0 **JOINT SCHEME FOR CHURCHES AND OTHER PLACES OF WORSHIP 1999-2002**

1.5.1 The Joint Scheme was relaunched in April 1999, with rather less fanfare than that which accompanied the 1996 launch. Both EH and HLF committed themselves to funding the scheme at £10m each per year. In the words of the introduction to the guidance notes: ‘The response to the Joint Grant Scheme for Churches and other Places of Worship after its launch in 1996 was overwhelming and eventually led to the suspension of the scheme for new

⁷ Information from EH CCAC paper 98/92 2 September 1998

⁸ Letter from Anthea Case, HLF Director to Pam Alexander, EH Chief Executive, 22 December 1988

⁹ *ibid*

applications in May 1998. Since then EH and HLF have been working together to revise the Joint Scheme so that it is better able to meet the essential repair needs of the ecclesiastical built heritage, within the overall requirements being placed on both organisations by government'¹⁰.

- 1.5.2 Those requirements are to some extent common to EH and HLF, though HLF 'seeks to provide additional public and community benefits and is required specifically to consider the scope for reducing deprivation in making grant awards'. So trustees prioritised funding to specific areas of England, and 'it is not expected that grants from the HLF will be awarded outside these areas'.
- 1.5.3 The guidance notes continued: 'The main focus of the scheme for both organisations is to support urgent repair works...whilst we are keen to see the provision of appropriate modest new facilities to encourage wider community use of a church, such projects will only be considered once any necessary urgent repairs have been completed.' Grants were to be concentrated on separate programmes of work with a single aim e.g. either urgent repairs or the provision of facilities, but not both.
- 1.5.4 There were to be four streams of application:

Stream 1: Projects costing £10k-£250k, urgent high level repairs to grade I and grade II* places of worship (EH's traditional clients)

Stream 2: Ditto for Grade II buildings (to be funded by HLF, with priority given to churches in areas of deprivation)

Stream 3: Non-structural projects (including new facilities) costing between £10k-£250k, any grade (HLF, in priority areas)

Stream 4: a) All projects, any grade, costing £250k or more (HLF only, if in priority areas) or b) urgent high level repairs to grade Is and II*s costing £250k or more (EH)

Streaming applications in this way allowed EH and HLF to identify which application was each organisation's responsibility, and for each to apply its own criteria. HLF limited applications in streams 2 and 3 to churches lying in the top 50 most deprived areas on the DETR's list, or in the coalfields areas as defined in the Coalfields Task Force Report. Some of these areas overlapped. It was acknowledged that the DETR index was a blunt instrument (it excluded most of the country and nearly all rural areas) but the list was nationally recognised; furthermore the coalfield areas were high on the Government's agenda.

- 1.5.5 Administration of the relaunched scheme saw the introduction of application deadlines. The closing date for projects costing £250k or more was 30 June, and for those costing £10k-£250k 30 September.
- 1.5.6 Further to target grants for new facilities, the guidance notes advised: 'The HLF's directions from Government require them to ensure that their money

¹⁰ From Introduction to *Guidance Notes for Applicants*

is put to use for the wider community. Applicants for new facilities should be able to show that they have thought through the uses to which the new facilities will be put, that there is a genuine demand from other sections of the community for the facilities they seek, and that the facilities will be properly run and managed'. The notes stressed the importance of demonstrating that:

- The works are on a modest scale
- The church does not already possess such facilities or there is no suitable facility locally
- The alterations can be accommodated without damage to fabric or character
- They will lead to wider use, and include provision for the disabled
- They are located, wherever possible, in discrete spaces

1.5.7 While the original scheme had made no provision for approval of future works, the forms now made clear that 'we...ask you to seek our approval for such changes in the future by sending us a copy of any application you make for alterations that affect the church fabric or character...'. They also stated that 'we will require provision to be made for public access and for the future maintenance of the building'.¹¹ These were not specified, but the access condition involved the perpetuation of the previous condition that the church should be kept open in daylight hours or, if this was not possible, that the details of a key holder should be prominently displayed outside the building. The maintenance requirement involved the annual completion and return of a checklist, giving details of maintenance undertaken.

1.5.8 Extensions and re-ordering for liturgical purposes were specifically ruled ineligible. Eligible non-structural works included the following

- Rewiring heating and lighting 'only where the existing systems pose a real threat to the fabric or where such works form part of other grant-aided alterations or new works, or where appropriate heating can provide demonstrable conservation benefits to historic fabric....' (thus making it clear that this was for the benefit of the building rather than its users)
- Fire detection, lightning protection and security systems
- Contents where they contribute significantly to the special interest of the building or are of significance in their own right
- Repair of bells, bell frames and organs
- Access to and within the building without compromising historic integrity of fabric, including ramps. However, interpretation or display boards, books, leaflets and postcards, audio guides and audio induction loops were *not* eligible.

1.5.9 For those grappling with demand management, it was soon clear that the tighter criteria of the revamped scheme had not gone far enough. A paper to EH's CCAC in February 2000 reported that since the reopening of the scheme 736 applications had been received, seeking funding in excess of

¹¹ *ibid*

£106m (against a budget of £20m). The paper reported ‘it is clear from these figures that we have not succeeded in curtailing the demand for assistance and that further steps need to be taken if we are to be able to manage that demand in a more effective manner’.

1.5.10 The CCAC discussion, at which HLF was also represented, considered various strategies for coping with these difficulties. Further tightening the criterion of structural urgency was not possible, since this had already been pared down to cover only urgent high level works needed within two years. Curtailing large grants would allow a more even spread of grants, but would cause enormous problems for some very high profile cases. Changing submission deadlines was also considered, as was the batching of applications (something previously resisted). A further suggestion was that HLF rather than EH should help grade I and II* churches in areas of deprivation, although CCAC were concerned about how EH’s ‘walking away’ from such areas might be perceived. At this stage HLF were unwilling to review the question of priority areas, for example to reflect concerns about lack of support for rural churches, in the absence of objective research or data upon which to base such a change.

1.5.11 Following these and other discussions the scheme was modified to bring forward the deadline for applications in Stream 1 to 30 June, thus spreading the workload of regional teams. Furthermore, from April 2000 all applications were to be batched, that is considered together with all others in their stream. On April 5 a letter was sent to counter-signatories advising them of these adjustments. The letter also encouraged applications seeking grant aid for new facilities to discuss their plans with EH before submitting their application. This was to weed out unsuitable or ineligible projects at an early stage.

1.6.0 New VAT Grant Scheme

1.6.1 In his March 2001 Budget the Chancellor of the Exchequer responded to some highly effective and well-articulated campaigning about the burden for congregations presented by VAT at 17.5%. He announced the establishment of a new UK-wide grant scheme, the effect of which would be to reduce the VAT cost for repairs to listed churches to 5%, from 1 April 2001. A letter was sent by EH and HLF to counter-signatories on 5 April welcoming this development, but confirming that the joint scheme would continue to operate unchanged. The letter also confirmed that the new handling arrangements initiated in April 2000 had worked well, and that 2000-01 had seen a more manageable level of demand. More grant applications were being determined within target times, and there had been fewer rejections on grounds of relative priority. Counter-signatories were also advised that the DETR had revised its list of priority areas, to show 22 newly identified local authority areas with high levels of social and economic deprivation.

1.6.2 What was not then apparent, but emerged later, was that the Treasury had required DCMS to contribute to the costs of what became known as the

Listed Places of Worship (LPW) scheme, and that the Department had asked EH to fund this contribution by re-directing some of the grant-in-aid that they (EH) would have used to fund the Joint Scheme in 2001-02 and 2002-03. Fortunately, HLF trustees agreed to compensate for this loss, by making a further £5m available in 2001-02, initially to be offered on eligible projects in deprived areas.

1.7.0 **Review of Joint Scheme 2001**

1.7.1 Discussions on the success or otherwise of the relaunched scheme, and what might replace it in 2002, began over the summer of 2001. To help in this process, Jeremy Eckstein Associates were asked to conduct an exercise¹² assessing financial need, by means of:

- A questionnaire sent to all 32 County Historic Churches Trusts and other grant givers to discover how their grants were awarded and the relationship (if any) to the joint scheme;
- Examination of existing data from the VAT survey (which had recently been carried out, also by Jeremy Eckstein Associates), denominational statistical returns and the material collected in 1994 for the EH/CCC *Church Needs Survey*, with a selective follow-up;
- A limited survey in a defined representative area of the needs and costs of conserving contents and fixtures e.g. wall-paintings, monuments, hatchments, to establish a broad costing for this area of work;
- Discussions with stakeholders and a seminar
- An examination of a selection of applications.

1.7.2 Eckstein's report estimated an annual requirement for repairs to Church of England churches alone of about £60m for grade II* and I churches and £32m for grade II churches. These figures did not include VAT (although by then listed churches could reclaim 12.5% of this), and demonstrated an annual funding shortfall of £72m between the £92m that was needed and the £20m (for all denominations) that was available. This went a long way to explaining the level of demand under stream 1, and the inevitably lower than average success rate.

1.7.3 The broad conclusions of the review were summarised in a paper prepared for HLF Trustees at their meeting on 16 October 2001. This concluded that the joint scheme had:

- Provided a single front door for applicants and therefore removed confusion about who to apply to;
- Provided targeted application materials with clear streams/themes which were relatively easy to use;
- Managed over-demand;

¹² *An Assessment of the Needs of Places of Worship in Use Across the UK*, August 2001.

- Eliminated the possibility of double-funding by HLF/EH;
- Limited double handling by EH/HLF;
- Met HLF's need to receive expert advice on repairs;
- Given priority to urgent-high level work;
- Targeted HLF's grants on selected priority areas.

However, the balance of funding between streams had been uneven, with EH's stream 1 heavily oversubscribed and HLF's streams 2 and 3 undersubscribed. This had the effect of limiting the success of the scheme in meeting HLF's objectives, especially in regard to community facilities. It was considered that restricting grants for grade II churches to specified deprived areas had not been effective in directing funds to where they were most needed, rural churches being a notable loser. On the administration of the scheme, there was also a perception in HLF of poor service from EH, and a frustration with the administrative difficulties of running what was in effect two or three schemes within a single programme.

1.7.4 Looking forward to the successor scheme, the report concluded that HLF 'must continue to respond to the conservation needs of this sector by funding repairs to historic churches'. It was also clear that 'the provision of physical and intellectual access must continue to be a condition of grant'. The question of wider community benefit was thornier, and the paper considered that 'it may be unnecessary to insist that a church repaired with HLF grants must demonstrate that it will be used by a wider selection of the community than its existing faith or community groups'.

1.7.5 The key conclusions from the paper were that:

- Priority for funding should be given to urgent high level or structural works throughout the UK;
- In order to cut down on over ambitious schemes, and to spread funding around, most such grants should be capped at a maximum size of £100k;
- A ring-fenced amount per annum should also be made available to major projects on a competitive basis. This may include projects enabling the community use of churches which offer strong public benefits in partnership with other funders, but HLF's funding should be prioritised on conservation work;
- HLF should continue to support provision of modest facilities, where these will be used for wider community purposes, and where no other facilities are readily available;
- All repair grants should require, and include funding for, the preparation of a 10-year maintenance plan;
- All repair grants should carry clear conditions covering intellectual and physical access, which will be subject to monitoring and enforcement;

- HLF should promote the availability of grants to encourage access and learning and interpretation projects for places of worship;
- HLF should offer funding for the conservation of contents at risk, subject to appropriate access provisions, and after taking advice from the CCC;
- HLF should offer funding for the conservation and management of churchyards.

1.7.6 It was clear however that it would not be possible to support all of these worthwhile endeavours through the operation of the Joint Scheme alone, at least not without a very significant increase in the budget.

1.7.7 A separate paper that went to the same meeting of HLF Trustees on 16 October 2001 made various recommendations for the successor scheme in England. The paper considered that the Joint Scheme was under great strain and unworkable in its present form. It recommended its replacement with a simpler, repairs-only scheme, administered by EH. The advantages to HLF of delegating administration to EH were that handling a large volume of church repair applications would be enormously resource-hungry and would dissipate activity in other areas, such as promoting *Your Heritage* and other grants programmes. Secondly, even if church grants were handled in-house, HLF would continue to be reliant on EH for advice, and the spectres of double handling and double applications would return. Third, a separate repair scheme would allow HLF to focus on other aspects of work on churches, such as those set out above in 1.7.5. In summary, what was proposed was:

- A repair grants scheme providing for all places of worship of all grades, focussing on urgent repairs.
- This would be targeted on areas of need, but in England this would be based on needs assessment rather than deprivation indices.
- An allocation per country and, where necessary, a batched assessment process;
- Co-ordination with statutory agencies over handling of joint applications;
- In England, a scheme delegated to EH with a budget of £20m per annum;
- Agreed arrangements for dealing with larger cases;
- Clear conditions for grants linked to access and ongoing maintenance.

With regard to **non-repair schemes**, these were outside the scope of what the statutory agencies had the resources or the powers to support. The HLF saw ‘absolutely no reason – other than for repairs – to treat churches differently from any other heritage project. If we are approached for smaller grants or for a revenue/activity project built around a church or churches, this should be assessed against the scheme’s normal criteria’.

1.8.0 REPAIR GRANTS FOR PLACES OF WORSHIP IN ENGLAND 2002-2005

1.8.1. The new scheme was launched at the end of April 2002. £21m was made available for the first year; £15m from the HLF and £6m from EH. A further £4m was made available from EH to fund unresolved applications from the previous joint scheme. Of the £21m, £16m was earmarked for grade I and II* places of worship and £5m for those listed in grade II.

1.8.2. The guidance notes set out the HLF's generic aims:

- To encourage more people to be involved in and to make decisions about their heritage;
- To conserve and enhance the UK's diverse heritage; and
- To make sure that everyone can learn about, have access to, and enjoy their heritage.

The notes continue: 'This scheme is for urgent repairs to the fabric of the building only and is open to all places of worship in England listed grade I, II* or II.' However, 'HLF will continue to welcome applications for projects other than urgent fabric repairs concerning places of worship under their other grant programmes...', although it would still be necessary to demonstrate that any urgent structural repairs had been done. While the listed areas of deprivation had gone, the notes stated 'if we need to prioritise further, we will give priority to those places of worship which are in geographical areas that have benefited less from our grant aid in the past; or are in areas of economic or social deprivation'.

1.8.3 The scheme was targeted at projects costing less than £200k. There was an increased emphasis on maintenance, with a new requirement that grant recipients should create a (grant aided) maintenance plan. Batching would be applied for all categories, with grade I and II* places of worship considered together first, and the grade IIs later. In the event of an offer being made, there would be a 2-stage process. Stage 1 would be for project development, and would establish the full extent (and cost) of works. This would introduce some element of certainty into the process, to the benefit of grant-giver and grant-recipient alike. Stage 2 would be the repair contract. Payment regimes would be simplified, and there would be no increases. There would be a contract between grant giver and recipient.

1.8.4 The access condition was more demanding than under previous schemes. 'We will expect you to provide for regular advertised visitor access to your place of worship on at least 28 days of the year and at other times by appointment or through a keyholder'. Grant recipients had to 'confirm your opening arrangements with your EH regional office once a year. We may publish these details on our websites'.

1.8.5 In a move to improve the level of professional advice available to grant recipients, notice was given that 'From April 2003 it will be a condition of the grant that a registered architect should also be conservation accredited'.

1.8.6 HLF aimed for a broadly consistent approach to places of worship across the UK, giving the highest priority to urgent repairs, but taking account of local circumstances. There would be a common format to the application documentation, with specific detailed guidance for each country. There would also be the same use of deadlines, batching of applications and use of the 2-stage process.

1.9.0 Repair Grants for Places of Worship in Scotland 2002-2005

1.9.1 In Scotland, the scheme is run in partnership with Historic Scotland (HS). There is the same emphasis as in England on high-level urgent repairs, and support is for projects costing between £10k and £200k. In the first year £2.5m was allocated by each organisation. This went down to £1.5m each in year 2 and to £1.25m each in 2005-06. This conforms with an objective shared by both HLF in Scotland and HS to reduce grant aid to historic places of worship. Before 2002, these accounted for about half of the HLF's grants budget, attracting criticism from a minister in the Scottish parliament.

1.9.2 To qualify, places of Worship have to be listed in grade A, B or C. HS can only grant aid buildings deemed outstanding, a definition based not (as in England) on listing grade but (as formerly in England) on an assessment of merit. There are 5 bands, of which only buildings in the top 2 bands are eligible.

1.9.3 Priorities for HLF in Scotland are places of worship which

- are in geographical areas that have benefited less from grant aid in the past;
- are in areas of economic or social deprivation, or
- show strong community benefits, including regular use by wider community groups

1.9.4. Grant conditions apply for 15 years in the case of HS grants and for 10 years for HLF grants. The public access requirement is for at least 14 days per year (compared with 28 in England), which may be adjusted depending on circumstances and the size of the grant. As in England, it was made clear at the outset that from April 2003 grant recipients would be required to employ a conservation accredited architect or surveyor.

1.10.0 Repair Grants for Places of Worship in Wales 2003-2005

1.10.1 The Welsh scheme was launched in January 2003. It is not a joint scheme; Cadw is not a partner, and operates separate grant schemes. The initial allocation was for £1m per annum; this was reduced to £950k in year two. Grants are available for projects costing more than £10k and less than

£100k. Funding can be up to 90% of eligible works, but partnership funding is expected.

1.10.2 Priorities for the HLF in Wales are places of worship which:

- are in geographical areas that have benefited less from grant aid in the past; or
- are in the top 100 areas of economic or social deprivation, as defined by the Welsh index of Multiple Deprivation 2000 (which lists electoral divisions within unitary authority areas)

1.10.3 As with Scotland, public access is required on at least 14 days per year. The guidance notes make no reference to possible inclusion of opening arrangements on HLF's website. There is no approval of future works condition, although 'any alterations...may require either listed building consent or approval under the ecclesiastical exemption'. There is no requirement for conservation accreditation of architects. Instead, grant recipients must employ 'a competent professional with relevant specialist conservation knowledge, skills and experience...The professional must be a conservation architect with appropriate experience, or a chartered building surveyor who has conservation accreditation from the RICS'.

1.11.0 Repair Grants for Places of Worship in Northern Ireland 2002-2005

1.11.1 As in Wales, the Northern Ireland scheme is operated by the HLF alone; the Environment and Heritage Service (EHS) of the Department of Environment is not a partner and operates separate grant schemes. Only listed churches (category A, B+, B, B1 or B2) are eligible. The scheme supports projects costing between £10k and 200k, and can support up to 75% of eligible project costs. In the first year £930k was allocated; in 2005-06 this has dropped to £630k.

1.11.2 Priorities for HLF in Northern Ireland, as for Scotland, are places of worship which:

- are in geographical area that have benefited less from grant aid in the past;
- are in areas of economic or social deprivation; or
- show strong community benefits, including regular use by wider community groups

1.11.3 Public access is required for 14 days a year, as in Wales and Scotland. Possible inclusion of details on the HLF's website is mentioned. Grant recipients are required to create a 15 year maintenance plan, with a report sent annually for the first 10 years after the grant. With regard to future work - 'You must tell us about any significant elements of work proposed for 10 years after the grant has been awarded'. Requirements as regards professional advice are as for Wales i.e., not requiring architects to be accredited in conservation.

PART TWO

SUCCESSSES AND FAILURES OF THE SCHEMES

2.1.0 THE JOINT SCHEME FOR CHURCHES AND OTHER PLACES OF WORSHIP 1996-99

2.1.1 How far did the scheme meet the needs of the applicants and the heritage assets?

2.1.2 In general terms, the first Joint Scheme failed, and both organisations are still living with the legacy of that failure. It was a well-intentioned attempt to meet the needs of both the applicants and the heritage assets. It was inclusive in nature, offering support for new facilities, bells, organs, monuments, heating and lighting, monuments and churchyard structures as well as repairs. For repairs, it encouraged a generous and inclusive approach as to what might be tackled in any one programme. Most significantly, it extended the net of support to include grade II places of worship. However, in seeking to be inclusive and helpful, it failed to take account of the likely demand, created administrative chaos, and ultimately let down the applicants and heritage assets that it sought to help.

2.1.3 The scheme was not wholly successful in reaching out to new clients. Of the 964 applications submitted between 1 November 1996 and 31 October 1997, 77% of applications were for grade I and II* listed buildings, and only 19% for grade II buildings. This was unrepresentative insofar as EH had calculated that 42% of listed churches and chapels in England were listed in grade II. Nearly two-thirds of applications (63.2%) came from churches which had previously been in receipt of EH grant aid, the vast majority of them medieval, rural Anglican churches. The number of moral objectors was low; only 27, of which 21 were from the Church of England. At this time the synod of the Methodist Church had not yet voted to sanction applications for lottery money and so Methodist and other congregations with moral objections would only be likely to apply if their building was highly graded, and they might therefore benefit from EH grant aid. However, the majority of listed non-conformist chapels were grade II. Only 74 of the 964 applications came from non-Anglican congregations, of which the highest number (28) were for Roman Catholic churches¹³.

2.1.4 How far did the scheme help manage demand and expectations?

¹³ Information from minutes of a seminar held at EH on 3 December 1997 to review the first year of operation of the scheme, on EH file.

- 2.1.5 This is where the scheme failed most conspicuously. With the benefit of hindsight, it is easy to see now that the scheme over-reached itself in terms of what it promised to deliver. The categories of work which it aimed to support were generous in the extreme, unleashing a tidal wave of applications with which neither organisation was able to cope, and which went way beyond the budget allowed for. The scheme was a victim of its own hyperbole, and of the general raising of expectations that accompanied the advent of the National Lottery. HLF's principal adviser, English Heritage, did not have the resources to meet the level of demand, nor did it have the necessary expertise to advise on certain themes (such as bells and organs) which were now coming to the fore. The moratorium of 1998 was a necessary expedient, but a humiliating one, which has left a damaging legacy to this day in the sector.
- 2.1.6 Insofar as the launch of the new scheme had been seen as heralding support for a much wider range of projects, expectations here would have been disappointed. The vast majority of the money offered (88.8%) was for structural repairs. Only 3.9% went to new facilities. This was no doubt more a reflection of the two organisations' stated priorities (see 1.3.5) than an indication of a lack of demand.
- 2.1.7 Having dwelt on the failures, it should be stressed that the intention behind the Joint Scheme was laudable, and some of the benefits it brought were tangible and long-lasting, both for applicants and for the heritage assets. Chaos and confusion had reigned before its introduction, with double handling of applications, wildly inappropriate schemes being advanced in the absence of clear guidelines, and a general lack of an overall strategy for places of worship on the part of the newly-formed HLF. Many of the arguments for a joint scheme remain valid to this day. These are:
- That joint funding meant that there was more money available for places of worship than ever before;
 - For the first time, grade II places of worship were able to benefit from grant aid;
 - Broadening the criteria to include new facilities re-invigorated the life and use of many places of worship, and saved some from closure and possible demolition;
 - In EH, HLF was able to take advantage of the experience of an organisation closely familiar with the problems facing places of worship, and with well-established networks in the sector;
 - The 'single front door' avoided double handling and parallel applications, and benefited applicant and EH/HLF alike;
 - There was a consequent reduction in administration and bureaucracy.
- 2.1.8 It was clear therefore that the advantages of the Joint Scheme merited its continuation. However, it was equally clear that without an enormous expansion of resources, the demand needed to be managed. That meant narrowing the criteria for eligibility.

2.2.0 JOINT SCHEME FOR CHURCHES AND OTHER PLACES OF WORSHIP 1999-2002

2.2.1 How far did the scheme meet the needs of the applicants and the heritage assets?

2.2.2 After the problems with the first scheme, what applicants needed above all was clarity and some degree of certainty. A scheme more modest in scope but better able to deliver was preferable to one which promised the earth but ended with a moratorium. By refining the criteria to include only urgent repairs, unless in specified areas of deprivation, where new facilities were also eligible, a greater clarity was achieved. With regard to the needs of the assets, it was clear from all the studies, and from the response to the first scheme, that the need for help with urgent repairs took priority over other desiderata.

2.2.3 However, the focus on areas of deprivation, while in tune with broader Government priorities, was somewhat arbitrary in the context of historic places of worship. To be sure, there were plenty of buildings in such areas that benefited under this scheme. However, there were many more, particularly in rural areas, which were not able to benefit, and this gave rise to much criticism of the scheme. As with the original scheme, the vast majority of applications (94%) came from Church of England congregations.

2.2.4 How far did the scheme help manage demand and expectations?

2.2.5 Even with its tighter criteria, the revamped scheme did not succeed in managing demand and expectations. The paper to EH's CCAC in February 2000 reported that since the reopening of the scheme 736 applications had been received, seeking funding in excess of £106m (against a budget of £20m). The paper reported 'it is clear from these figures that we have not succeeded in curtailing the demand for assistance and that further steps need to be taken if we are to be able to manage that demand in a more effective manner'.

2.2.6 It was also clear that 563 applications (75% of the total) were for urgent repairs to grade I and II* listed churches costing less than £250,000, and therefore submitted under stream 1. Only 94 applications had been submitted in stream 2; it was noted that limiting grants to priority areas excluded 75% of grade II churches. Only 46 applications had been received under stream 3, perhaps reflecting the requirements that such schemes would only be considered once any urgent repairs had been completed. 33

applications had been received under stream 4, but these represented about a third of overall demand.

2.3.0 REPAIR GRANTS FOR PLACES OF WORSHIP IN ENGLAND, SCOTLAND, WALES AND NORTHERN IRELAND 2002-2005

2.3.1 How far have the current schemes met the needs of the applicants and the heritage assets?

2.3.2 The further tightening of criteria to exclude all but urgent high level repairs is generally accepted, and even welcomed. The schemes that now operate in England, Scotland, Wales and Northern Ireland have a greater clarity and focus than previous schemes. The application forms are straightforward and not too arduous to complete. The two stage process has benefited both applicants and heritage assets alike. Applicants are able to get a clear idea of costs at the outset and to plan and fund raise accordingly. This also has obvious benefits in terms of the efficient administration of the scheme. The buildings also benefit from the investigative work and informed conservation that now typically precedes programmes of repair. Although the requirement in England and Scotland for professional accreditation has been controversial, it is hoped that this too will prove beneficial to applicants and heritage assets alike.

2.3.3 Like its predecessors, the repair grants scheme has primarily benefited Church of England churches. While the vast majority of highly graded historic places of worship are of course Anglican churches, it is notable how few non-conformist chapels and Roman Catholic churches of any grade have benefited. Many non-conformist congregations have moral objections to the lottery and if responsible for a grade II building will not seek funding from that source. However, in 1999 the Methodist Church altered its policy to allow congregations to apply in good conscience. There are about 700 listed Methodist chapels and about 620 listed Roman Catholic churches. In 2002-3 there were 58 non-Anglican applications, resulting in 20 offers. In 2003-04 there were 42 applications and 22 offers. In 2004-05 there were 54 applications and 34 offers. Thus applications have averaged at about 50 a year but the chances of success have risen from about 1 in 3 to about 1 in 1.5, a higher success rate than that achieved by Church of England applications. This might reflect an improvement in the quality of non-Anglican submissions, and/or a greater readiness on the part of HLF and EH to be inclusive. Nevertheless, the overall number of applications remains relatively low. The number of grant offers to non-Christian places of worship is even smaller, reflecting the fact that very few of these are listed. Across all the schemes, HLF has made 20 awards to 15 non-Christian places of worship, totalling £1,741,892. Of the fifteen beneficiaries, 13 have been synagogues, one a Sikh temple and one a Buddhist temple.

- 2.3.4 **How far have the current schemes helped manage demand and expectations?**
- 2.3.5 The sharpening of definition of the scheme and the emphasis on phasing (with a strong disincentive to take project costs into the highly competitive £200,000 plus bracket) has had the effect of better managing both demand and expectations. In 2005-06 380 applications have been received for grade I and II* places of worship, of which 37 are in the national batch i.e. for projects costing £200,000 or more. Of these, 166 have been taken forward, eleven of them in the national batch.
- 2.3.6 The emphasis on supporting small-scale projects costing under £200,000 ensures that as many buildings and congregations as possible are helped. For buildings which have major repair needs, and which are unsuccessful in the national round, this means phasing the work and making repeat applications. This has been criticised for offering poor economies of scale and inducing fundraising fatigue and low morale in congregations. The criticism carries some weight, but has to be set against the laudable intention of supporting as many manageable projects as possible. There have been no reported examples of calamitous building failure or collapse which can be attributed to a decision to phase the work.
- 2.3.7 **What levels of maintenance are being achieved and how could these be increased?**
- 2.3.8 The current scheme involves the preparation of a 10-year maintenance plan (15 years in Northern Ireland) as part of the project development stage. It is a condition of the stage-two repair grant that this is put into practice, and the annual submission of a maintenance report is required.
- 2.3.9 At this early stage it is not possible to say what levels of maintenance are being achieved, since very few annual returns have been received and no detailed monitoring has taken place. A recent study of nineteen churches which had been in receipt of grant aid for repairs and/or new facilities over the last ten years¹⁴ revealed that nearly a third of them had no satisfactory maintenance regime in place, although each of them had accepted grant conditions relating to future maintenance. While it is difficult to draw wider conclusions from such a small sample, the fact that any of these churches were not being properly maintained so soon after receiving a grant is a matter for concern.
- 2.3.10 Before seeking to increase levels of maintenance, existing levels need to be established. The fact that annual returns are not being submitted is something which needs to be raised with archdeacons and counter-signatories. Resources should be found to allow for targeted monitoring, to ensure that grant recipients are carrying out their maintenance obligations (**See Part 4, Recommendation 14**). This might be achieved by EH

¹⁴ Derrick, A. *Assessment of the Impact of Heritage Lottery Fund/English Heritage Places of Worship Funding*, April 2005

architects and surveyors carrying out spot checks in the course of their travels in the regions. Similar arrangements should be put in place in the other countries, using architects and surveyors from heritage agencies or private practice.

2.3.11 What levels of physical and intellectual access are being achieved and how could these be increased?

2.3.12 Improving public access to the historic environment, both physical and intellectual, is central to the objectives of both HLF and EH. The current grant schemes for England, Scotland, Wales and Northern Ireland have varying requirements for public access, none of them onerous, but make no provision for enhanced intellectual access (in the form of interpretive materials, guidebooks etc).

2.3.13 In a recent major publication on church buildings¹⁵, Sir Simon Jenkins has written:

‘Access is the single most vexing topic among church enthusiasts....Almost no church has a sign outside giving opening hours, which might at least pre-empt a fruitless walk to the door. Vicarage home numbers, if they are publicised, are frequently on answering machines. Notices giving the address of the key holder, when they exist, are often illegible and lack a map. I know of no diocese that publishes a list of opening times and key holder’s addresses ...

The customary excuse for locking a church is the threat of vandalism and the cost of insurance. Vandalism can be most distressing for those victimised. Fortification may be justified in a few inner city churches, though even they capitulate to vandalism far too easily. Most insurers do not insist on churches being locked, only in their being periodically supervised. In my experience, the chief difference between an accessible and a shut church is not its location or the value of its contents but the attitude of the vicar and churchwardens...

...no security is as effective as a regular flow of welcomed visitors. A parish church is a church open to all. A church shut except for services is the private meeting house of a sect.’

2.3.14 Jenkins was writing from the viewpoint of the church visitor or tourist. However, there is strong evidence that a locked church is not in the interest of the regular congregation either. Jenkins writes that most insurers do not insist on churches being locked. In fact, they positively discourage it. The Ecclesiastical Insurance Group advises:

‘If at all possible your church should be left open during the day for those who wish to pray, or who wish to find a place for quiet contemplation. It should also be open for tourists and other visitors with

¹⁵ Simon Jenkins, *England’s Thousand Best Churches*, 1999 pp.xxxii-iv

an interest in historic buildings who find it very disappointing when a church is locked, particularly if they have travelled some way. The presence of legitimate visitors will also help to deter those with a criminal intent. It is not the policy of Ecclesiastical Insurance to ask for churches to be kept locked during the day'.¹⁶

2.3.15 In 1988 National Church Watch was set up to help all places of worship reduce crime. This is sponsored by EIG, URC Insurance, Baptist Insurance, Methodist Insurance and ANSVAR (a church insurance company). Their website www.nationalchurchwatch.com reports that twice as many locked churches suffer from crime as open ones.

2.3.16 In recent years, the Open Churches Trust has done much to advance the case for open churches. In its early years the Trust gave grants to churches to pay for attendants and stewards to help with security and provide a welcome for visitors. This resulted in a marked increase in visitors to attended churches. The ultimate objective of the Trust is to enable anyone at any time to wander in and out of churches at will.¹⁷

2.3.17 A noteworthy initiative in Scotland, encouraging both physical and intellectual access, has been the creation of Scotland's Churches Scheme, an ecumenical Charitable Trust which assists participating churches to:

- Work together with others to make the church the focus of the community
- open their doors with a welcoming presence
- tell the story of the building (however old or new), its purpose and heritage (artistic, architectural and historical)
- provide information and care for visitors, young and old.

There are 903 churches in this scheme (about 500 of them listed), operating an open doors policy. There is a 430-page guidebook *Churches to Visit in Scotland* with information about the buildings, access arrangements, visitor facilities, special events, opening and service times and an index of artists.

2.3.18 It is clear from the above that there are many good reasons for keeping places of worship unlocked, and few if any reasons for locking them. This is one area where the current scheme could be refocused at relatively little cost, bringing added 'lottery flavour' and public benefit (**see Part 4, recommendation 11**).

2.3.19 **How far is the scheme succeeding in supporting the professionalism and capacity of those responsible for the upkeep of places of worship?**

¹⁶ From EIG website www.ecclesiastical.co.uk

¹⁷ From Open Churches Trust website www.openchurchestrust.org.uk

2.3.20 It is widely acknowledged, but always worth repeating, that those responsible for the upkeep of places of worship are invariably unpaid volunteers. They are not professionals, nor in most cases do they have recourse to professional business planners or fundraisers (unless in a voluntary capacity). It is not over-sentimental to say that this voluntary effort is the human backbone which keeps these edifices upstanding. However, such efforts need encouragement and support. This support comes in part from the professional advice offered by architects and surveyors, and in the requirement for conservation accreditation, the current scheme has sought to ensure that this advice is of an appropriate standard. The scheme has also supported applicants and their advisers through the intangible but undoubted benefits of the highly specialised advice and rising of awareness about building maintenance and repair that comes from the support of EH's professional advisers. However, the scheme has not gone as far as it might in terms of providing tangible additional support; recommendations as to how it might do so in future are set out in part 4.

PART THREE

THE BIGGER PICTURE: RECENT POLICY, RESEARCH AND FUNDING DEVELOPMENTS

3.1.0 POLICY DEVELOPMENTS

3.1.1 In recent years there has been a determined effort to raise the profile of the historic environment, and to highlight the benefits of conservation-led regeneration. The following is a brief summary of the major developments in the policy-making area as they affect historic places of worship.

3.1.2 2000 *Power of Place: The Future of the Historic Environment*

3.1.3 *Power of Place* (2000) was a collaborative document produced under the auspices of English Heritage but with widespread involvement across what had by then become known as ‘the sector’. It was an attempt by that sector to make a co-ordinated case for the historic environment, in order to raise its profile with, and release additional funding from, government. It was also aimed at the sector itself. While the document made no specific recommendations as regards places of worship, relevant recommendations included:

- Equalising VAT at 5% for all building work
- Promoting a shift from cure to prevention, by encouraging regular condition surveys and planned maintenance of historic buildings and piloting self-help initiatives
- For the heritage sector to work with excluded groups to develop access policy and practice

3.1.4 *The Historic Environment: A Force for Our Future*

3.1.5 *Force for Our Future* (2001) was the DCMS’ response to *Power of Place*. It set out the Government’s broad policy objectives for the historic environment as follows:

‘The Government looks to a future in which:

- public interest in the historic environment is matched by firm leadership, effective partnerships, and the development of a sound knowledge base from which to develop policies;
- the full potential of the historic environment as a learning resource is realised;

- the historic environment is accessible to everybody and is seen as something with which the whole of society can identify and engage;
- the historic environment is protected and sustained for the benefit of our own and future generations;
- the historic environment's importance as an economic asset is skilfully harnessed.¹⁸

3.1.6 There were no specific commitments concerning places of worship, other than an undertaking to review the ecclesiastical exemption from listed building control and a reference to the new VAT grant scheme announced in 2001. More generally, and responding to the emphasis given to the importance of maintenance in *Power of Place*, the document stated:

‘The Government fully endorses the increasing importance attached to the preventative maintenance of historic fabric. In discussions with English Heritage about future funding priorities, it will explore how a shift of emphasis towards preventative maintenance might be reflected in grant programmes’.¹⁹

The document also stated

‘The Government will encourage grant givers to give a degree of priority to training in conservation craft skills’²⁰

3.1.7 **2002 The State of the Historic Environment Report (*Heritage Counts*)**

3.1.8 One of the early and most valuable responses to *A Force for Our Future* was the preparation, from 2002, of an annual State of the Environment report, later renamed *Heritage Counts*. This is produced under the auspices of English Heritage, but with input from a steering committee and regional committees drawn from across the sector. Its purpose is to examine change in the historic environment, by drawing together a mass of existing, and some new, statistics and data. This has included information on places of worship relating to redundancy, funding, repair needs, and public opening.

3.1.9 **2003 *New Work in Historic Places of Worship***

3.1.10 This English Heritage guidance, issued in 2003, sets out the principles and policies that EH applies when considering new work in historic places of worship. Its ringing opening sentence is ‘English Heritage wishes to secure the future of this country’s historic places of worship as living buildings at the heart of their communities. We believe that they should be well used, and visited and enjoyed by all’. At the same time EH announced that it was dropping its grant condition that places of worship which had been in receipt of grant aid were forever bound to seek EH approval for future alterations.

3.1.11 **2003 *Protecting our historic environment: Making the system work better***

¹⁸ *A Force for Our Future* p.9 para.9

¹⁹ *A Force for Our Future* Para 2.19

²⁰ *Ibid* para.4.13

3.1.12 This is a major review of the existing designation and control regimes, instigated by DCMS in 2003. It seeks to simplify and unify the myriad designations and controls that apply in the historic environment. Particularly relevant to historic places of worship is the suggestion that future controls might be exercised through high-level management agreements. The ramifications of these proposals are still not clear in 2005. However, it is likely that such management agreements, in addition to addressing questions of alteration and adaptation, will include programmes of planned building maintenance.

3.1.13 **Review of the Pastoral Measure**

3.1.14 This is an ongoing review concerning extended use for Anglican places of worship, and reviewing the procedures relating to churches no longer required for worship. The question of extended use is very pertinent to HLF's oft-stated desire to grant aid the provision of new facilities in historic places of worship, where these can be held to be of benefit to the wider community as well as the worshipping congregation. The consultation document sets out the legal and other obstacles associated with the concept of extended use.

3.1.15 **2004 English Heritage Strategy for Historic Places of Worship**

3.1.16 This strategy was announced in 2004, and coincided with the appointment of a Places of Worship Strategy Implementation Manager. The first stage of the strategy, to be developed with a number of partners, includes:

- Taking stock of the condition of the historic fabric, as well as the number of buildings with 'fabric at risk of loss';
- Examining the feasibility of running a maintenance grants scheme alongside established grants for major repairs;
- Training people to help congregations understand the history and significance of the buildings in their care;
- Creating a network of advisers to help congregations maintain the fabric of their place of worship
- Guiding congregations on the re-use and adaptation of historic places of worship, based on the experiences of the last 30 years.

3.1.17 **2004 *Building Faith in Our Future***

3.1.18 *Building Faith in Our Future* is a major document written by the Church Heritage Forum on behalf of the Church of England. It celebrates church buildings and the volunteers who maintain them, seeks to awaken greater understanding of how church buildings contribute to the community and seeks partnerships to sustain those achievements in the future. It is aimed at Government, Regional Development Agencies, local authorities, and all other partners, including EH, HLF and national amenity societies. The document contains a wealth of statistical information about funding for

places of worship, drawing comparisons with current practice in other countries. Key recommendations include:

- ‘We urge national, regional and local bodies to pay special attention in their funding and planning decisions to the importance of places of worship...
- We draw attention to the considerable catalyst that a church building can provide for regeneration of an area, and urge funding authorities to recognise this and respond to it in their proposals
- ...In rural areas, as elsewhere, places of worship may have potential for providing community facilities that are otherwise lacking.
- We ask that public funds should be made available for appropriate modification of church buildings and the upkeep of community facilities within them.
- Maintenance of church buildings is often the key to avoiding future repairs. We recommend that an element of the public funding available be used to support maintenance programmes...
- We draw attention to the limited State funds received by churches in this country, in contrast with other European countries.
- Central funding for repair of historic church buildings is insufficient...
- The Heritage Lottery Fund needs continuing support from Government to continue its work. We welcome the help the HLF has been able to give new works as well as repairs in churches, and urge them to continue this assistance...
- We warmly welcome the contribution of other Trusts and funding bodies that give grants towards repair of historic churches. There may be potential to simplify, streamline and develop a greater consistency in the application processes, to reduce unnecessary hurdles for parishes. We recommend that the major grant givers consider together the scope for doing so.’²¹

3.2.0 RECENT RESEARCH

3.2.1 Recent years have seen a number of relevant research initiatives. These have included market research into public attitudes to the historic environment, and specifically to historic places of worship. There has also been a more thoroughgoing attempt to assemble the existing data on places of worship, and further research into their fabric and repair needs, the contribution of faith communities to social objectives, and the impact of church tourism.

3.2.2 MORI Poll 2000

3.2.3 In 2000 a Mori survey of views about the historic environment was carried out with a representative 3,000 people in England for *Power of Place* (see below, paragraph 3.3.3). Findings included:

²¹ *Building Faith in Our Future*, Church House Publishing 2004, Key recommendations 1, 8, 10, 11, 22, 25, 26, 27, 29 pp 4-5

- 96% think that the historic environment is important in teaching children about the past;
- 86% think it is important in creating jobs and boosting the economy;
- 87% think that it is right that there should be public funding to preserve it;
- 87% think that it plays an important part in the cultural life of the country;
- 76% think that their own lives are richer for having the opportunity to visit or see it.²²

3.2.4 ORB Poll 2003

3.2.5 While the MORI poll was useful as an indication of public views about the historic environment in general, it did not have relevance to particular building types. A survey jointly commissioned by EH and the Church of England in 2003 from ORB (Opinion Research Business) specifically sought to ascertain the views of the general public on places of worship. Findings included:

- 86% of adults in Great Britain had been into a church or place of worship in the previous year – including 89% of Christians, 75% of those of other faiths and 80% of those with no religion.
- When asked for their reasons for visiting, a high proportion of respondents mentioned rites of passage (weddings, baptisms and funerals). Apart from these the most commonly cited reason was that they were seeking a quiet space (19%, rising to nearly 40% in inner city areas).
- 73% see churches and chapels as quiet places or sanctuaries in the community.
- 59% regard their local place of worship as a local landmark and 63% would be concerned if it were no longer to be there.
- Most respondents were happy to see a variety of uses for their local churches and chapels. 75% agreed churches should be used for activities other than worship and 68% said they should be social meeting places.²³

3.2.6 A separate poll carried out in 2003 had shown that by contrast 52% of people had visited a historic park or garden in the previous 12 months, 46% a historic building and 51% a cinema.²⁴

3.2.7 It can be seen therefore that places of worship are important and much visited buildings, highly valued by a wide cross-section of society, and not just to those who worship in them. While there appears to be a public readiness to see them put to additional use, the importance of places of

²² Quoted in *Power of Place: The Future of the Historic Environment* 2000 p.4

²³ Quoted in *Building Faith in Our Future* 2004, p.3

²⁴ English Heritage, *Heritage Counts* 2003

worship as quiet places and sanctuaries, especially in urban areas, should not be overlooked.

3.2.8 *How Do We Keep Our Parish Churches?*

3.2.9 *How Do We Keep Our Parish Churches?*, published by the Ecclesiological Society in 2004, is the most comprehensive compilation of data yet assembled on the buildings of the Church of England. Useful statistics include:

- There are some 16,200 Church of England churches, about 13,000 parishes, and approx 8,500 stipendiary clergy. There are now about 2000 more churches than there were in 1851, but Sunday attendance is less than 1m compared with 2.5m in 1851.
- The percentage of the population on church electoral rolls is about 3.5% compared with 13% in 1900.
- In contrast, membership of the National Trust in 2005 stands at 3.4m
- 10% of parishes (i.e. about 1300 churches) have a Sunday attendance of 10 adults or fewer.
- Just 4 dioceses (Hereford, St Edmundsbury and Ipswich, Norwich and Carlisle) have nearly 12% of parish churches, but only 4% of the population.
- In 2002-03 English Heritage gave 19% of its grants to places of worship.
- Between 1995-2003 more than £40m (71%) of the £61m which HLF have provided for places of worship under the joint schemes went to areas of deprivation. 4 English Regions (London, North West, West Midlands, Yorkshire) received £50m of this.

3.2.10 On the matter of grants, the report considered that:

‘EH/HLF grant aid may be seen as the superpower in this sector, and has been for many years. It dominates the field. Any withdrawal would have a major impact on large projects’.²⁵

It also referred to the multiplicity of grant-giving bodies and the attendant problems of multiple form filling and variety of dates and deadlines.²⁶

On extended use, the report stated that some 50% of rural churches are already used for non-religious events e.g. concerts. The ‘Rural churches in Community Service’ scheme (see paragraph 3.3.13, below) had provided grants to 100 churches, and was significantly over-subscribed. A Chelmsford diocesan survey found that of its 614 church buildings, more

²⁵ Ecclesiological Society, *How Do We Keep Our Parish Churches?* 2004 p.31

²⁶ *Ibid* p.32

than 100 had already put in place major adaptations for wider use and another 30 had plans in hand. 33% looked forward to wider use of their building.²⁷

3.2.11 Fabric Needs

3.2.12 The *Churches Needs Survey*, carried out by EH and the CCC in 1994/95 had suggested, on the basis of a sample of five areas, that (assuming a grant rate of 40%) the minimum annual grant needed to assist the repair of grade I and II* Church of England churches alone was £20m, with a further £10m needed for grade II churches.

3.2.13 A follow-up report commissioned by HLF from Jeremy Eckstein in 2001²⁸ estimated an annual requirement for repairs to Church of England churches alone of about £60m for grade II* and I churches and £32m for grade II churches. These figures did not include VAT (although by then listed churches could reclaim 12.5% of this), and demonstrated an annual funding shortfall of £72m between the £92m that was needed and the £20m (for all denominations) that was available.

3.2.14 In 2003, the Parochial Return form (sent annually to all Church of England parishes) asked for information about outstanding repair costs. Responses from two dioceses alone (£15m needed for listed churches in Norwich and £10m for listed churches in Chelmsford) indicated repair needs equal to the total allocated to England under the EH/HLF grants scheme in 2004-05.²⁹ Altogether, around £101m was spent by parishes on major repairs to churches in 2003, and a further £11.5m on other major repairs to other buildings on ecclesiastical sites. These figures do not include the cost of minor works and maintenance. The overall estimated cost of major repairs still required in 2003 to the 16,196 Anglican church buildings in England, once all works undertaken in the year had been taken into account, was £373m. Of this, £323m, or 87%, relates to listed churches. These figures need to be treated with caution. They are based on estimates given by parishes, without any further detailed analysis.³⁰

3.2.15 At the time of writing (October 2005), English Heritage is working with the Church of England on an update of the 1994-5 *Churches Needs Survey*. By revisiting the same sample of 140 churches (not just Anglican ones) in five areas of the country, the aim is to identify the cost of repairs carried out since 1995 and of what still needs to be done. While the outcome of this study is not yet known, it can reasonably be predicted that, like all the other studies, it will demonstrate a repair need significantly in excess of the grant funding available.

3.2.16 Looking beyond the Church of England, in 2003 the Roman Catholic Church in England and Wales, which is responsible for 620 listed churches (compared with about 700 in the Methodist Church and about 13,000 in the

²⁷ Ibid p.39

²⁸ *An Assessment of the Needs of Places of Worship in Use Across the UK*, August 2001

²⁹ Information from *Building Faith in Our Future* 2004 p.10

³⁰ Information from *Building Faith in our Future: Progress Report* August 2005

Church of England) estimated that the repair needs of all these listed churches (based on costed surveys of 187, or 30% of them) suggested a gross repair bill over £52m over five years, an average of £10.4m per annum.³¹

3.2.17 **Social contribution of faith communities**

3.2.18 A 2005 study of the economic impact of faith communities produced on behalf of the North West Regional Development Agency estimated that the 1,385 places of worship and associated buildings made available to local communities by faith communities in the North West generated £811,472 per annum. A 2004 survey carried out in Brighton and Hove found that out of the 55 community buildings identified by the survey as essential to the provision of over 300 community projects and services offered by faith communities, 47 were church buildings provided by the churches themselves.³²

3.2.19 **Impact of Church Tourism**

3.2.20 There have been several recent initiatives to promote church tourism. The North Yorkshire Church Tourism initiative ran for three years and in that time increased the number of annual visitors recorded to the 285 participating places of worship by 120%. Total number of visitors recorded for the year 2004/5 was 203,952.³³ Critical to the question of the availability of places of worship for tourists is the question of access (see paragraphs 2.3.1-2.3.18, above).

3.3.0 **FUNDING DEVELOPMENTS**

3.3.1 There have been significant developments in the funding of historic places of worship since the launching of the first Joint Scheme in 1996, and any review must take account of these when framing its recommendations. The following sets out in outline the major new sources of funding, or significant changes to existing sources of funding. It is by no means an exhaustive list of possible sources of funding for places of worship. The best source for this is the *Funds for Historic Buildings* directory of grant-giving agencies (www.ffhb.org), which lists no fewer than 73 bodies which might be able to help places of worship.

3.3.2 **HLF Main Grants Programmes**

3.3.3 Places of worship have benefited from HLF's main grants programmes both before and since the advent of the various Joint Schemes. When the criteria for the Joint Scheme were tightened to exclude all categories of work except for urgent high level repairs, HLF Trustees recognised that they could and should continue to support projects involving places of worship which met

³¹ From *Third Interim Report of the Patrimony Committee Listed Buildings Working Party*, 17 September 2003

³² Information from *Building Faith in our Future: Progress Report* August 2005

³³ *Ibid*

other priorities for regeneration, access, education and participation. The programme known generically as Heritage Grants is the biggest single grants scheme operated by HLF. Projects should conserve and enhance the heritage or encourage more people to be involved in their heritage or both. They should also encourage learning about, access to and enjoyment of the heritage. Projects can include nature conservation, historic buildings, museum collections, archive collections, spoken history records, cultural traditions, and objects and sites relating to the UK's industrial, transport and maritime history. Applicants for a grant of £5 million or more are required to demonstrate the regional or national benefits of their project. HLF assesses applications for grants of £5 million or more in competitive batches twice a year, using the two-stage process.

3.3.4 Notable beneficiaries under this scheme include St Martin in the Fields (grant of nearly £14m), St George's, Bloomsbury (£2.4m) and the redundant church of St Stephen's Rosslyn Hill (over £2m). According to information provided by HLF, over £225m has been offered for 1,129 projects involving places of worship under the generic programme of Heritage Grants since 1995-96. This is more than twice the amount (£111,804,867 according to its own figures) that HLF has offered for places of worship under the various Joint Schemes. The figure of £225m includes grants for Cathedrals (over £25m) and redundant churches, but other places of worship have also benefited to a high degree. This programme has allowed some very high-profile projects and conservation problems to be resolved, which the constraints of the Joint Scheme's budget and criteria would not have accommodated.

3.3.5 Since the introduction of the current RPOW scheme there has been a trend towards a reduced level of HLF support for places of worship under the main grants programmes. In 1996-97, nearly £37m was offered towards 170 projects. Thereafter annual grant totals averaged around £24m until 2002-03, when £18.3m was offered for 94 projects. In 2003-04, about £30m was offered for 59 projects, but around £14m of this was for St Martin in the Fields. In 2004-05 £7.67m was offered, for 36 projects.

3.3.6 *'Your Heritage'*

3.3.7 This scheme can consider applications for the conservation of historic furnishings and works of art in places of worship. The programme offers grants to organisations which aim to look after and enhance the UK's heritage, to increase involvement in heritage activities and to improve access to and enjoyment of heritage. Under the *Your Heritage* scheme grants of £5,000 to £50,000 can be awarded, although the total project cost can exceed £50,000. Projects must be able to demonstrate educational and community benefits and applicants must ensure that their premises are accessible to visitors. Eligible projects in historic places of worship include conservation of bells, clocks, organs, paintings on canvas & wood, wall paintings, monuments, timberwork, ornamental plasterwork, metalwork, books & manuscripts, textiles as well as historic structures and other conservation projects in churchyards.

3.3.8 Places of worship are continuing to benefit from this scheme. According to figures provided by HLF, just over £6m has been offered for 189 projects involving places of worship under this scheme since 2000-01. In 2003-04 alone £2.25m was offered. Many small scale repair projects, as well as new facilities and provision for interpretation and education have been realised by this route. Not all of this would have been to places of worship in use but much of it has been, and a surprisingly high proportion of expenditure (94% according to the HLF's calculations) has been on conservation work, as opposed to improved interpretation, new facilities etc.

3.3.9 **The Arts Council**

3.3.10 The Arts Lottery Fund, administered by the Arts Council, may be of assistance for places of worship seeking to improve their cultural facilities e.g. use for concerts and plays, and to commission contemporary art and craft work. It may also assist major organ reconstruction projects for concert use (but not for the conservation of historic instruments). No information is available about how much has been offered to places of worship under this programme.

3.3.11 **Big Lottery Fund**

3.3.12 Big Lottery Fund is a new organisation that will allocate half the money for good causes from the National Lottery. It was created by merging the New Opportunities Fund and the Community Fund. Its potential value to historic places of worship has yet to be established, but it is certainly worth considering whether there is scope here for supporting new community facilities in places of worship.

3.3.13 **Rural Churches in Community Service Programme**

3.3.14 In 1997 the National Rural Officer of the Church of England, along with the Church and Community Trust (now Living Stones), applied to the Millennium Commission for funding to enable rural churches to adapt their buildings to allow for extended community use. In November 1997 the Millennium Commission gave conditional approval for a grant of £2.5m to adapt 100 church buildings. Whilst the funding was for capital works, the initiative had to be firmly focused on the wider community with all projects demonstrating projected high levels of use and the support of the community. Rural Churches in Community Service Limited (RCCS) was set up to distribute and manage the funding. The programme ran from 1998 to 2001 and assisted 99 churches in rural areas throughout the UK.

3.3.15 In 2004 the impact of the programme on 66 Church of England churches was reviewed by Joy Rowe³⁴. The review looked at the success of the projects against their original aims, sought to establish who had benefited

³⁴ Rowe, J: *A Review of the Rural Churches in Community Service Programme*, February 2004

from the new facilities, assess the impact on the church congregation and the church finances, and see what lessons could be learned from these projects.

3.3.16 Rowe concluded that the programme had been very successful, with most projects meeting their aims and some achieving far more than planned. 92% of the churches reviewed were successfully running community activities and 79% of the churches report a positive effect on the congregation. In her view the programme had demonstrated that churches were quite capable of managing sizeable capital developments, that many churches were very outward looking and that the church and the wider community *could* work in partnership to add value to community life and to individual lives within the community.

3.3.17 **Listed Places of Worship (LPW) Grant Scheme**

3.3.18 In 2001 the Chancellor of the Exchequer announced the establishment of a new UK-wide grant scheme, the effect of which would be to reduce the VAT cost for repairs to listed churches to 5%, for repair work started after 1 April 2001.

3.3.19 In his March 2004 Budget announcement the Chancellor announced that, with effect from 1 April 2004, listed places of worship would be able to claim from this grant scheme the *full* amount of VAT paid on eligible works.

3.3.20 Almost £32m has been awarded in grants under this scheme up to the end of June 2005 throughout the United Kingdom. Of this £24.7m was paid to 9,600 different listed places of worship in England, an estimated 90% of which are Anglican churches.³⁵ **However, the Scheme is currently due to continue only until the end of March 2008.**

3.3.21 **Landfill Tax Credit Scheme**

3.3.22 The Landfill Tax Credit Scheme (LTCS) was designed to help mitigate the effects of landfill upon local communities and support moves to more sustainable waste management practices. It encourages partnerships between landfill operators, local communities and the voluntary and public sectors. Since 1996 landfill operators have been permitted to offset up to 20% of their tax obligations as a credit which can be applied to environmental bodies and projects which can include the maintenance and repair of church buildings. The regulatory body of the Landfill Tax Credit Scheme is ENTRUST.

3.3.23 The LTCS has several objects, of which one (Object E) is 'projects to restore or repair buildings for religious worship, or of architectural or historical interest which are within ten miles of a landfill site'. Some churches have also benefited under Object D ('projects that provide or

³⁵ Cathedral and Church Buildings Division *Building Faith in Our Future Progress Report*, August 2005

maintain public amenities...'). ENTRUST calculates that to date (October 2005) it has spent £29,329,855 on church projects.³⁶ Some county building preservation and historic churches trusts have enrolled themselves as contractors. The Methodist Church (many of whose members have moral concerns about applying for lottery funding) has been particularly successful in applying for funds from this source - £700,000 in 2003-4.

3.3.24 The Government has recently changed the regulations governing the LTCS so that more money is available for initiatives to encourage sustainable waste management. This has meant that less money is available for projects such as repairing church buildings.

3.3.25 **Historic Churches Preservation Trust (HCPT)**

3.3.26 The HCPT was established in 1953. Its main purpose is to help churches of all denominations that are at least one hundred years old and in need of structural repair. In 2004 the Trust, with its sister charity, the Incorporated Church Building Society, awarded grants of just over 1.5m. Applicants responsible for grade Grade I or II* churches are required to approach English Heritage or Cadw (as appropriate) before approaching HCPT. Traditionally, the Trust has not made grants for routine maintenance, new facilities or contents. However, in a recent development which reflects the increasing recognition of extended use as the key to the future survival of many churches, HCPT has awarded a small number of **grants for new facilities, including improvements for disabled access**. In 2005 £100,000 has been set aside for these purposes.

³⁶ Information provided to author by ENTRUST October 2005, following a search with the keyword 'church' in the description of the project.

PART FOUR

THE WAY FORWARD

4.1.0 General conclusions

- 4.1.1 This report should have established beyond dispute the importance of historic places of worship to the heritage of the nation, and the value attached to them by the wider public as well as their regular users. A very high proportion of these buildings are listed, and listed in higher grades (churches account for 45% of grade I buildings in England). At the same time, they are often high maintenance structures, used by diminishing and often ageing congregations, upon whose shoulders the burden of maintenance primarily rests. While some congregations thrive and are able to look after their buildings, many others do not. If these buildings are of value to society, and if we wish to avoid their closure or demolition, then society needs to help the congregations keep them going. It can do this through external subsidy in the form of grant aid. In the words of The Ecclesiological Society report, 'EH/HLF grant aid may be seen as the superpower in this sector, and has been for many years. It dominates the field. Any withdrawal would have a major impact on large projects'.³⁷
- 4.1.2 There can be no doubt that the additional funding that has been made available both for the repair of historic places of worship and the provision of new facilities has left the overall building stock in better shape than it has been for many years, and has helped further to stem the tide of redundancies. While there is no room for complacency, the positive impact of lottery support for places of worship, both through the various Joint Schemes and through other programmes, needs to be recognised and celebrated.
- 4.1.3 However, in Scotland, Wales and Northern Ireland, HLF's allocation to the RPOW scheme is now lower than it was at the time of the launch of the scheme (see figures in 1.9.1, 1.10.1, 1.11.1). In Scotland this has been matched by an equivalent reduction from Historic Scotland, and in Wales Cadw has reduced its funding to buildings of the Church in Wales.
- 4.1.4 The current RPOW guidance notes that 'HLF will continue to welcome applications for projects other than urgent fabric repairs concerning places of worship under their other grant programmes...' This has been borne out by the continuing strong level of support for places of worship under the Your Heritage programme. However, recent years have seen a reduction in the number of schemes supported (and, in most years, the overall amount offered) for projects involving places of worship within the main Heritage Grants programme (see figures in paragraph 3.3.5).

³⁷ Ecclesiological Society, *How Do We Keep Our Parish Churches?* 2004 p.31

4.1.5 **In view of the unique status of places of worship as a prominent, important and highly valued heritage category, and given the demonstrable need for support to keep these buildings in use and open and accessible for the enjoyment of all, it is recommended that HLF gives a high priority to supporting places of worship under all of its grants programmes, wherever this is compatible with broader lottery objectives.**

4.1.6 The current repair grants scheme has been more successful than its predecessors in targeting need and in streamlining application processes. This has been aided considerably by the establishment of HLF and EH regional offices. This has improved communications between the two organisations, and also been welcomed by grant applicants, who no longer perceive the organisations as remote. The scheme meets a demonstrable need. **HLF and EH are recommended to continue with the joint scheme for repairs to historic places of worship.** In return for this public investment, it is reasonable to require that the buildings which benefit from grant aid should be properly maintained, and that provision should be made for full public access wherever possible (see recommendations below).

4.1.7 It is considered that the emphasis on high level repairs should continue for the time being at least. However, steps need to be put in place to reduce future dependency and increase self-sufficiency. This will help contain, but probably never remove, the need for external subsidy in the form of grant aid. Some steps towards encouraging sounder management (such as maintenance plans) have already been taken, but not sufficiently followed up. Some steps towards encouraging greater self-sufficiency (such as grant aiding new facilities to aid future sustainability) have been started and subsequently abandoned. Recommendations relevant to these areas are given below.

4.1.8 While the current emphasis on urgent high level repairs is a practical response to a demonstrable need, it does not allow the scheme to deliver some of the wider benefits of other lottery-funded programmes. Recommendations as to how the scheme might acquire more ‘lottery flavour’, but not at the expense of urgent repairs, are given below.

4.2.0 **Use and Future Sustainability**

4.2.1 All the evidence suggests that widening the use of places of worship is a key to their future sustainability. It has long been recognised (at least since 1977 when State aid for churches was introduced) that it is not practical or reasonable to assume that the responsibility for repair and maintenance of a common inheritance of historic buildings should be borne solely by the regular users of the buildings. Grant aid for repairs has had a considerable impact in putting the fabric of countless churches into better order. Much still needs to be done in this area. Beyond this, new life needs to be injected into these buildings to ensure their future survival. In most cases, this means additional use beyond that of regular (or occasional) worship. This is accepted by most congregations and regulatory bodies. Market research has

indicated a general acceptance in the wider population of the principle of extended use.

- 4.2.2 This is particularly relevant in the case of medieval Anglican churches, where the so-called ‘secular’ use of naves in the Middle Ages is often cited. However, extended use of non-conformist chapels is also increasingly common, and non-conformist denominations are generally untroubled by the concept of extended use. Historically such buildings were typically built with adjoining halls and school rooms, but these have often been sold off as congregations have sought to realise the capital value of their sites and reduce their ongoing repair and maintenance costs. The concept of extended use is more problematic to Roman Catholics, who view the whole of the church building as a sacred space, and who usually have separate parish halls for ‘secular’ activities (although not a few Catholic churches have in recent years created discrete spaces for non-liturgical activities). It is also problematic for some Jewish congregations, for similar reasons.
- 4.2.3 While it is important that faith groups who hold such views are not unfairly disadvantaged in future grant schemes, for the vast majority of historic places of worship, some degree of appropriate extended use is to be encouraged as an aid to future sustainability. This process can be encouraged firstly through the legal frameworks and the policies of regulatory bodies such as DACs and English Heritage, and secondly through grants programmes.
- 4.2.4 While the current joint scheme is for urgent repairs only, a great many churches have been in receipt of grant aid for new facilities from HLF under other programmes, and nearly 100 rural churches benefited from the Millennium Commission’s Rural Churches in Community Service Programme. The benefits of these programmes, in terms of extending the use of the buildings and thereby increasing their future sustainability, have been demonstrated. **It is recommended that HLF strengthens its support for sympathetic and appropriate projects involving new facilities in historic places of worship, either through its established and new programmes, or through a refocused and enhanced Joint Scheme.**
- 4.2.5 Major interventions in historic places of worship can be very expensive but have often (as at All Saints, Hereford) transformed such buildings from unused repair burdens to thriving concerns. Notwithstanding one or two major London examples, there has been less support for such projects through the main Heritage Grants programme in recent years. Undoubtedly such schemes will continue to come forward, and it is to be hoped that HLF will continue to give these sympathetic consideration where the quality of the scheme and the needs of the building justify this. It would not be possible for such schemes to be supported through the Joint Scheme, unless it was very significantly expanded. **It is recommended that major schemes involving new facilities should continue to be supported through the main grants programme.**

4.3.0 Scope of Scheme versus Demand Management

- 4.3.1 The tight criteria of the present grant scheme are the result of a steady process of narrowing down, driven by a need to contain the level of demand. At each stage the narrowing down has been carefully considered both by HLF and EH, and has involved close liaison with the sector. Even with these narrowed criteria, demand continues to outstrip supply. While many parties would welcome an extension of the current criteria, nobody has questioned the wisdom of giving priority to urgent high level repair. As one consultee put it, ‘there’s no point in putting in new facilities while the water’s still coming through the roof’.
- 4.3.2 The clarity and relative simplicity of the present scheme have also been commended, and compared favourably with its predecessors. Such qualities are obviously more administratively convenient, but they are also helpful to congregations, as the letter from the Archdeacons in the Diocese of St Albans suggested (paragraph 1.3.10). Equally, the point has been widely made that the current scheme is only now fully bedded down and widely understood, and that the benefits of continuity outweigh the case for significant change.
- 4.3.3 There has been some criticism that the emphasis on urgent high-level-repairs has been at the expense of other important fabric needs, such as the repair of masonry walls. However, the existing scheme does allow for discretion here, and while it is desirable that this discretion should be exercised as widely as possible, this must always be within the limits of the available budget. In this context the priority given to high-level works is unarguable.
- 4.3.4 The narrow focus of the Joint Scheme also means that it is not able to support many important and worthwhile conservation projects, such as repairs to wall paintings, monuments, stained glass, organs, bells and bell frames. Such projects can often harness the interest of groups and individuals in a way that repairs cannot, with associated benefits in terms of training, education and public involvement. Many projects have benefited in this way from the *Your Heritage* programme, and it is hoped that they will continue to do so.
- 4.3.5 However there is a widely recognised, fundamental problem with the exclusive emphasis now given to urgent high level repairs. This is that it appears to encourage a culture of neglect rather than good management. The chances of getting a grant are now slim unless the building has reached a state whereby the work has to be done within two years, or there is an immediate risk of fabric loss. Faced with a choice of a pressing pastoral priority or taking pre-emptive action to deal with a fabric problem, most congregations would naturally choose the first. They could do this in the knowledge that if they leave the fabric to get worse, the chances of EH/HLF helping to pick up the bill are actually improved.

- 4.3.6 This is a reactive, fire-fighting approach to conservation. At the same time it is a pragmatic and rational response to a demonstrable need and the inevitability of rationing. There are no easy answers to this conundrum, and it will take many years to transform the culture from one of fire fighting to one of daily care and good management.
- 4.3.7 Therefore, for the time being at least, **if the allocation to the joint scheme is to remain at present levels, it is recommended that other than making provision for enhanced physical and intellectual access (see below), the existing criteria should remain.**
- 4.3.8 Nevertheless, there is general consensus that new facilities are necessary to the future survival of many places of worship and that these are worthy of HLF support. While nobody has suggested that they should take priority over urgent repairs, *if additional funding from HLF can be provided*, there would be advantages in providing this through the Joint Scheme:
- It would aid future sustainability of places of places of worship
 - It would give the Joint Scheme a more obvious ‘lottery flavour’
 - In England, EH has published guidance on the introduction of new facilities, and is embedded in the relevant statutory processes. They would therefore be well placed to act as HLF’s expert adviser in this area.

There would however be significant disadvantages:

- the Joint Scheme would lose something of its present clarity and relative simplicity
 - There seems to be little enthusiasm for extending the scope of the existing scheme, either within EH or within HLF offices in Scotland, Wales and Northern Ireland
 - Administration would become more complicated, and therefore more costly
 - there would be the risk of re-opening the floodgates
- 4.3.9 Increased funding permitting, the arguments in favour of extending the scheme to include new facilities are powerful, and HLF may wish to pursue this, in spite of the identified disadvantages. Chief among these is the problem of containing potential demand. This might be addressed by confining eligibility to those items which are most essential to continued and extended use: an accessible WC, some appropriate provision for catering and possibly a decent heating system. The myriad categories of other work which were supported in the first joint scheme would not be supported, although they may possibly find support in other HLF programmes.
- 4.3.10 **If additional funding were to be made available under the Joint Scheme, a separate stream relating to the provision of *modest* new facilities could be created. Funded by HLF, this would be restricted to works *essential* to continued and extended use: an accessible WC, a**

servery and possibly a new or updated heating system. In order to keep it simple and ensure wide coverage, a flat-rate contribution of £25,000 per project is recommended. Faculty approval or the equivalent should be obtained before applying. Applications would not be subjected to the 2-stage process, but would be batched and subject to submission deadlines. Containing demand may be a significant problem, particularly if heating is included, and a pilot programme may be necessary (see recommendation in paragraph 4.7.4) A further refinement might be to restrict future eligibility to places of worship which have been identified as vulnerable, according to criteria being developed by English Heritage.

4.3.11 There has been some criticism of the requirement of HLF that no new works or facilities should be supported until the full repair needs of the fabric have been attended to. While such a requirement is reasonable in cases where ‘the water’s coming through the roof’, there are cases where it might be possible to delay repairs while new facilities take priority. Given the demonstrable catalytic effect that new facilities can have, their introduction might in some cases reduce the need for further grants by virtue of the increased income generated by extended use. **It is recommended that where HLF receives applications for new facilities, whether through a refocused joint scheme or through its other programmes, that it exercises discretion as to the relative priority of repairs and new facilities.**

4.4.0 Physical and intellectual access

4.4.1 ‘Frequent use’ should not be interpreted narrowly in terms of activities and new facilities. One very important ‘use’ of historic places of worship is their importance to visitors as places of beauty and historic interest and, especially perhaps in inner cities, their role as places of sanctuary and calm. Encouraging places of worship to remain open, with appropriate safeguards, will increase this kind of use and thereby aid future sustainability. Providing guidebooks and relevant information would enhance public understanding and enjoyment of the heritage. Improving physical and intellectual access would be relatively cheap, offer better value for money for the investment of taxpayers and lottery ticket purchasers, and would be wholly consistent with the aims and objectives of both HLF and EH.

4.4.2 At present, the fact that places of worship have been in receipt of grant aid, and have undertaken to abide by access conditions, is not widely advertised. In England, where 28-day opening is required, the guidance notes advise applicants that ‘You will have to confirm your opening arrangements with your English Heritage regional office once a year. We may publish these details on our websites’.³⁸ In Scotland, although only 14 days opening are required, in other respects the requirements are a little more demanding. Applicants are advised ‘You will have to confirm your opening arrangements with Historic Scotland and the Heritage Lottery Fund once a year. You must publish this access information in Churches to Visit in

³⁸ *Repair Grants for Places of Worship in England* Guidance notes p.16

Scotland and on our websites' (*sic*)³⁹. In Wales (14 days), applicants are simply told 'You will have to confirm your opening arrangements with us once a year'⁴⁰ and no mention is made of the HLF website. The guidance for Northern Ireland (also 14 days) states: 'You will have to confirm your opening arrangements with us once a year and show how you have publicised this access (website or local newspaper). We may also publish this information on our website'.⁴¹

4.4.3 Detailed information is not to hand about the extent of compliance with these varying requirements, but anecdotal evidence suggests a low level. There has been no monitoring of opening arrangements by EH or HLF, and no details of individual grants for places of worship have appeared on the websites of either organisation. This contrasts with the position with EH's secular grants where, following the critical report from the Parliamentary Select Committee on Public Accounts in 2002⁴², details of buildings which have received grant aid, and the opening arrangements, are published on the organisation's website. To pre-empt similar criticism of the operation of the joint repairs scheme, and to promote access to grant-aided places of worship, **it is recommended that immediate steps are taken to ensure that details of grant aided buildings and access arrangements are published on the websites of both organisations.**

4.4.4. Furthermore, following the success of the annual publication *Hudson's Historic Houses and Gardens*, which includes details of EH-grant aided properties, **EH and HLF are recommended to work with denominations and faith groups on the production of a register of *Places of Worship to Visit in England***, which would include opening details of grant aided buildings. The sheer number of places of worship in England, and the shifting nature of their individual circumstances, suggests that a web-based publication would be more useful and economic to produce than a traditional publication.

4.4.5. Looking to the future, it is considered that the joint grant scheme could go further in helping to shift the culture away from locked churches to one of easy access, thereby fulfilling core objectives of both HLF and EH. This will not always be easy to achieve, and not all congregations and denominations would welcome it. On the other hand, all grants are discretionary and it is reasonable for both HLF and EH to work towards a greater degree of public access and enjoyment of historic buildings. **It is therefore recommended that with future grants there will be a presumption that the building should be unlocked and freely available to visitors during daylight hours. Where security considerations make this inadvisable, grant assistance should be made available to help meet the costs of stewarding or other measures.**

³⁹ *Repair Grants for Places of Worship in Scotland* Guidance notes p. 15

⁴⁰ *Repair Grants for Places of Worship in Wales* Guidance notes p.15

⁴¹ *Repair Grants for Places of Worship in Northern Ireland* Guidance notes p.15

⁴² *2001-02 Fraud Report – An Analysis of reported fraud in Government Departments and best practice guidelines; English Heritage: Access to Properties* (HC265)

- 4.4.6. At present there is no scope for enhanced intellectual access in the scheme. Indeed, provision for education and interpretation are specifically excluded. This does not fit easily with HLF's remit and other grants programmes. On the other hand, a major shift of resources away from high-level repairs towards education and interpretation would not be justified by current needs and priorities. What is needed is some modest and helpful provision which will enhance visitor understanding and enjoyment without undue diversion of resources. **It is recommended that future offers should require the preparation of a good quality guide, and that this should be a grant eligible item.** The level of detail and/or illustration would vary from case to case. A general template for these could be created, avoiding over-prescriptiveness.
- 4.4.7. Enhanced provision for physical and intellectual access is likely to be supported by HLF in all countries. By contrast, there seems to be little desire within HLF in Scotland, Wales and Northern Ireland to expand the scheme to include new facilities, and little discernible outside pressure or demonstrable need, apart possibly from in Wales, for them to do so. Furthermore, the relationship between HLF and English Heritage is not precisely paralleled in the equivalent relationships in other countries. Therefore, **while it is desirable that the widening of the scope of the scheme to enhance physical and intellectual access should be applied in all the countries, provision for new facilities might apply just in England (and possibly Wales).**

4.5.0 Maintenance

- 4.5.1 The importance of maintenance has assumed a higher profile in recent years. Pilot schemes are being undertaken to test the workability of various maintenance schemes for places of worship, for example in the dioceses of London and St Edmundsbury and Ipswich. The Government has emphasised the importance of maintenance, and encouraged EH to 'explore how a shift of emphasis towards preventative maintenance might be reflected in grant programmes'.⁴³
- 4.5.2 While there has been little in the way of research to assess the long-term benefits of sound and proactive building management, a scheme which has been running in the Anglican diocese of Rochester for over 50 years may offer some useful insights.⁴⁴ This amounts to a savings scheme, in which parishes contribute to a trust fund operated by the diocese, with a view to meeting the cost of anticipated repairs, based on the quinquennial survey. In return for this they receive various benefits, including soft loans, a free annual electrical survey and a free QIR. There is a healthy subscription rate (contributions are not taken into account when the quota is assessed), and currently parishes contribute on average about £2500 per year. Further study of the impact of this long-running scheme would be worthwhile, assessing overall annual repair spend against the national average, and investigating

⁴³ *A Force for Our Future* Paragraph 2.19

⁴⁴ Source: *How do we keep our parish churches?* Ecclesiological Society 2004, p 30

the number and nature of repair projects that go forward for external grant aid.

4.5.3 While maintenance is not a cure all, since all building materials are finite, there can be little doubt that many problems are brought about or exacerbated by poor maintenance. It is good management practice, and sensible husbandry of resources, to encourage proper maintenance as a condition of grant aid. Preparation of a maintenance plan is of course included as part of the grant aided package under the current scheme, although there is no evidence that this is being seriously monitored. **It is recommended that maintenance plans should continue to be required as a condition of grant aid, and that resources are set aside for targeted monitoring, to ensure that grant recipients are carrying out their maintenance obligations.**

4.5.4 It is *not* recommended that the scope of the joint scheme should be expanded to include maintenance. This would be enormously resource-hungry and runs the risk of creating a dependency culture, transferring primary responsibility for maintenance from the congregation to EH/HLF.

4.5.5 Nevertheless, the difficulties faced by congregations are recognised, and it is desirable that help should be made available, both in the form of general advice and financial help. The Government is encouraging EH to shift the focus of its grants towards maintenance, and HLF may wish also to consider what steps it might take in this area. Grants towards pre-emptive works of maintenance and minor repair might be particularly helpful in reaching out to new audiences and partners. A recent study of the RC Diocese of Lancaster⁴⁵ has revealed a building stock which is generally in good repair but which is approaching the stage where diminishing congregations are finding it increasingly difficult to meet ongoing maintenance and repair costs. They are unlikely to be helped by the present grants scheme, with its exclusive emphasis on high-level repair. In such cases a partnership maintenance scheme would help pre-empt larger future repair bills (or, worse, redundancy), and would dovetail in with the proactive management approach being encouraged by the Government's current review of heritage protection. **It is recommended that HLF and EH investigate the feasibility of establishing a further grants programme for the maintenance of listed places of worship, working with dioceses and their equivalents, or perhaps through the offices of the 32 County Trusts.** Coupled with community involvement and education programmes, such a programme might come within the remit of the *Your Heritage* programme.

4.6.0 Sector Capacity

4.6.1 In this context, 'the sector' refers not just to individual congregations, but also to the professional advice at their disposal and the availability of suitable builders and contractors.

⁴⁵ *An Architectural and Historical Review of Churches in the Roman Catholic Diocese of Lancaster*, Architectural History Practice, November 2005

- 4.6.2 It is not considered that the relatively modest widening of scope outlined above would make significant new demands on architects, surveyors, builders and contractors.
- 4.6.3 However, a shift towards making places of worship more fully accessible would have significant implications for communities and congregations. It would require the marshalling of volunteers and stewards to provide a human presence, both to make the buildings more welcoming and to help with security. As previously suggested, grant assistance might be made available in situations where this presented a particular difficulty e.g. in inner city areas with high levels of crime against ecclesiastical property.
- 4.6.4 Similarly, where new facilities are being provided, it is essential that this should in fact lead to increased use of the building. For that to happen, individuals need to be appointed to manage bookings, prepare the building, do any clearing up etc. In offering grants for new facilities, HLF would of course need to satisfy itself that the congregation had the capacity to see the project through and manage it effectively thereafter. A simple business plan would be desirable, demonstrating how the building would be managed once the new facilities were in place. This would be in tune with the more proactive management approach which the current reforms of the heritage protection regime are seeking to engender.
- 4.6.5 Allied to this, EH should continue to encourage dioceses and their equivalents to employ building and conservation professionals to advise congregations on building management, adaptation, maintenance and repair issues. It may be possible for such posts to be jointly funded, as has happened in the Anglican Diocese of Manchester, possibly through capacity building grants. The need for such appointments is likely to be particularly important where the places of worship being targeted are those identified as ‘vulnerable’, and possibly lacking in people with the necessary expertise to drive projects forward. In such cases, project development and capacity building assistance may also need to be an element of any grant.
- 4.7.0 **Resource implications of expanding the scope of the scheme.**
- 4.7.1 Revision of grant conditions to create a presumption of open access to places of worship would not have significant additional resource implications for HLF/EH (although it should be noted insufficient resources are being brought to bear to monitor compliance with *existing* conditions, either with regard to access or to maintenance).
- 4.7.2 Requiring grant recipients to prepare a guidebook or similar should have few resource implications, once a general template had been agreed.
- 4.7.3 Extending the scheme to include a stream relating to new facilities would have significant resource implications in terms of administration and professional input, especially for EH. (It is assumed that in England HLF would look to EH for advice on new facilities as it does on matters of repair). If this were to be a ‘light touch’ stream, involving self-certification

and little or no monitoring, but with the proviso that the works had been authorised and were specified and overseen by the inspecting architect or a conservation accredited professional, then the resource implications at application stage may not be significant. Where they *would* be significant would be in the inevitably numerous pre-application discussions, involving EH specialist staff and DAC members (or their equivalents in other denominations). These discussions may of course prove abortive if the grant application was unsuccessful.

- 4.7.4 It is not easy to say at this stage what level of demand there might be for a stream devoted to new facilities under a revamped joint scheme, but it is likely that it would be high. If the current scheme is extended to 2008, that might allow time for a pilot exercise to be undertaken in one or two regions. **Therefore, HLF is recommended to fund a pilot exercise in order to gauge the likely level of interest and the workability of such an extension of the scheme** before the launch of the successor scheme.

Summary of Recommendations

- 1 **In view of the unique status of places of worship as a prominent, important and highly valued heritage category, and given the demonstrable need for support to keep these buildings in use and open and accessible for the enjoyment of all, it is recommended that HLF gives a high priority to supporting places of worship under all of its grants programmes, wherever this is compatible with broader lottery objectives. (Paragraph 4.1.5)**
- 2 **HLF and EH are recommended to continue with the joint scheme for repairs to historic places of worship. (4.1.6)**
- 3 **If the allocation to the joint scheme is to remain at present levels, it is recommended that other than making provision for enhanced physical and intellectual access, the existing criteria should remain. (4.3.7)**
- 4 **It is recommended that HLF strengthens its support for sympathetic and appropriate projects involving new facilities in historic places of worship, either through its established and new programmes or through a refocused and enhanced Joint Scheme. (4.2.4)**
- 5 **It is recommended that major schemes involving new facilities should continue to be supported through the main grants programme. (4.2.5)**
- 6 **If additional funding were to be made available under the Joint Scheme, a separate stream relating to the provision of *modest* new facilities could be created. Funded by HLF, this would be restricted to works *essential* to continued and extended use: an accessible WC, a servery and possibly a new or updated heating system. In order to keep it simple and ensure wide coverage, a flat-rate contribution of £25,000 per project is recommended. (4.3.10)**
- 7 **HLF is recommended to fund a pilot exercise in order to gauge the likely level of interest and the workability of such an extension of the scheme. (4.7.4)**
- 8 **It is recommended that where HLF receives applications for new facilities, whether through a refocused joint scheme or through its other programmes, that it exercises discretion as to the relative priority of repairs and new facilities. (4.3.11)**
- 9 **It is recommended that immediate steps are taken to ensure that details of grant aided buildings and existing access arrangements are published on the websites of both organisations. (4.4.3)**
- 10 **EH and HLF are recommended to work with denominations and faith groups on the production of a register of *Places of Worship to Visit in England*. (4.4.4)**

- 11 It is recommended that with future grants there will be a presumption that the building should be unlocked and freely available to visitors during daylight hours. Where security considerations make this inadvisable, grant assistance should be made available to help meet the costs of stewarding or other measures. (4.4.5)
- 12 It is recommended that future offers should require the preparation of a good quality guide, and that this should be a grant eligible item. (4.4.6)
- 13 While it is desirable that the widening of the scope of the scheme to enhance physical and intellectual access should be applied in all the countries, provision for new facilities might apply just in England (and possibly Wales). (4.4.7)
- 14 It is recommended that maintenance plans should continue to be required as a condition of grant aid, and that resources are set aside for targeted monitoring, to ensure that grant recipients are carrying out their maintenance obligations. (4.5.3)
- 15 It is recommended that HLF and EH investigate the feasibility of establishing a further grants programme for the maintenance of listed places of worship, working with dioceses and their equivalents, or perhaps through the offices of the 32 County Trusts. (4.5.5)



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