

**AN ASSESSMENT
OF THE NEEDS OF
LISTED PLACES OF WORSHIP
IN USE
ACROSS THE UK**



**Undertaken on behalf of
Heritage Lottery Fund
&
English Heritage**

REPORT & APPENDICES

**Jeremy Eckstein Associates
September 2001**

Strictly speaking, the remit of this study is to assess present needs, not to make recommendations. This legitimately includes giving voice to the views that were expressed by a number of the participants. It is not the author's function to add his own opinions. Nevertheless in the circumstances, inevitably the author forms views and opinions based on an impartial overview of the whole body of evidence. Where such views are expressed in the text of the report, they are clearly identified as being those of the author. It would be presumptuous to legitimise them by referring to them as "recommendations", but it is hoped that they might assist in the forthcoming review of policy.

The evidence that it has been possible to present in this report, represents the result of an enormous amount of laborious work undertaken carefully and conscientiously by church treasurers and secretaries, by the secretaries of the County Historic Churches Trusts and by the staff of a number of other foundations and trusts. Without their support, none of this would have been possible. To them, and to others who gave enthusiastic assistance throughout, I extend my grateful thanks. Hopefully their efforts will help to ensure that the listed places of worship around the country which are the "jewels in the crown" of our built heritage, will continue to be enjoyed by future generations as architectural treasures, at the same time as playing a central role in the lives of the communities they serve.

Jeremy Eckstein

September 2001

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1. Summary of Principal Findings

1.1 General Observations

1.1.1 Inevitably when inviting comments in reviews such as this, the emphasis of responses tends to dwell on criticisms rather than praise. The fact that this review contains a number of apparent criticisms therefore should not be taken to imply any widespread or fundamental dissatisfaction with the overall structure for providing grant-aid to listed places of worship as a whole. In fact this review found relatively few criticisms of the present situation. However some of those which were expressed could well have potentially wide-reaching policy implications.

1.1.2 A number of the critical comments may be traced back to a degree of confusion among applicants and recipients of grant-aid, with regard to precisely what constitutes "heritage". The Heritage Lottery Fund and the principal agencies all contain the word "heritage" in their titles, yet to many observers their funding policies take into account criteria which appear to have little if anything to do with "heritage" *per se* (in the generally accepted use of the word) but more to do with meeting politically correct notions of deprivation or wider social use. While accepting that funding derived from the Lottery should properly be for the benefit of the largest number of people, the author senses that there is a groundswell of opinion that believes that the nation's built heritage deserves to be rewarded on the basis of its own architectural merits alone, and should not have to seek justification on the grounds of wider community use.

1.2 Priority Areas

1.2.1 Following from the viewpoint expressed in para. 1.1.2 above, there is no argument with the need for some system of rationing to allocate finite grant resources, but there is considerable "grass roots" discontent at the manner in which Priority Areas have been designated as a means of achieving the desired result. The concern is that the Priority Areas almost exclusively represent areas of urban deprivation, and largely fail to recognise the concept of rural deprivation. This appears to be at odds with the Joint Scheme's stated objective

(Criterion 4) regarding wider community benefit. It is also difficult to reconcile with the fact that a disproportionate number of grade I and II* listed churches are in rural (frequently deprived) areas.

1.2.2 This view was presented with some passion by a member of the grants committee of one of the County Historic Churches Trusts, who added a note to the returned questionnaire which included the following comments:

- *"I do wish people would stop linking social deprivation with urban contexts. Rural deprivation is just as real, but often goes unseen. Parts of [the county] are EU recognised areas of deprivation and grants from the HLF when first introduced were extremely welcome. In many areas the church building is, if not the last, one of the few public buildings remaining in the village. The shop has closed, the post office has closed, the pub has closed, the school has closed, public transport is non-existent. The opportunity via the HLF to improve facilities within church buildings . . . returned churches to the status of social gathering places which . . . they were when originally constructed many centuries ago. With the rules of application changed, the total lack of funding from other sources for such improvements mean that these structures are used for a couple of hours a week and this situation will ultimately call into question their need and future. If the government is serious about regarding historic churches as "jewels in the crown" – many of which are ironically in rural areas – it should lift its urban biased restrictions on access to the HLF".*

1.2.3 It is the view of a number of participants in the surveys that the Joint Scheme appears to be being rationed according to criteria which actually have little or nothing to do with heritage merit *per se*. This is a situation which clearly has an especially heavy impact on a small number of predominantly rural counties which have a particularly rich ecclesiastical architectural heritage.

1.2.4 The situation is being exacerbated by the fact that many rural areas suffer from dwindling populations and economic bases which are being further eroded by the ongoing crises in farming of which the foot and mouth outbreak is just the latest in a long succession of disasters.

The emerging difficulties in the Church of England's financial situation may also add weight to the burden over the coming years.

1.3 Size of Grant-Aided Projects

1.3.1 In terms of the size of projects (as measured by the cost) there is a wide and clearly evident demarcation between the profile of "typical" projects grant-aided by the Heritage Lottery Fund in conjunction with English Heritage, Historic Scotland or Cadw and that of the projects undertaken by the large number of places of worship without the benefit of such grants. It seems quite proper to ration finite agency grant resources by reserving them for the finest "jewels in the crown". However [in the view of the author] when assessing the needs of listed places of worship as a whole, it is important not to lose sight of the very large proportion of churches undertaking work at the lower end of the spectrum which, even so, is beyond their immediate financial resources.

1.3.2 In general terms, it is apparent that low-cost repair projects generally fare well because the bulk of the cost of the work is readily met by grants from trusts, foundations and other sources. Equally, the more expensive repair projects are frequently able to apply for grant-aid from English Heritage. The projects that frequently have most difficulty in financing the work are those that fall in the middle range in terms of the costs involved. On the one hand they are too large to benefit proportionately well from the smaller grant-making trusts, and on the other hand they are often too small to warrant attention from the larger grant-making agencies.

1.4 Timely Intervention

1.4.1 Inevitably with old buildings in daily use, even with regular Quinquennial Inspection Reports, unexpected repairs will frequently play havoc with the most carefully planned work programmes. There is a strong body of evidence to suggest that this is indeed happening, and that this is resulting in the deferral of planned urgent repairs. Even with no intervening events to throw their budgets off track, many churches

nonetheless find it difficult to meet the cost of repairs agreed as part of a 5-year rolling programme.

1.4.2 One unfortunate consequence is that in spite of a QIR, many churches have no choice but to continue to attend to repairs on the basis of immediate necessity. The concept of "A Stitch in Time" - the idea that a timely repair now can prevent a more costly repair in a few years time - is fine in theory, but is something which many churches find it impossible to implement in practice.

1.4.3 The survey of the broad cross-section of churches originally assessed under the *Churches Needs Survey*, indicated that a significant number of them had been unable to carry out the repairs recommended, principally because of their inability to meet the costs involved. With many churches unable to afford the luxury of a contingency fund, other unforeseen work necessitates a constant juggling of priorities.

1.4.4 In the circumstances, the author wonders whether consideration might be given to introducing a simplified "fast track" grant programme for sums of up to say £10,000 for urgent work specifically where it could be demonstrated that not carrying out the work would almost certainly result in the need for substantially greater expenditure in the near future - perhaps on the specific recommendation of a Quinquennial Inspection Report.

1.4.5 The evidence of the data collected for this report suggest that the ceiling figure could well be set significantly lower than £10,000. However for practical reasons it might be desirable to set the figure at the present lower limit for Joint Scheme Stream 1 applications.

1.5 Matching Funding

1.5.1 This is becoming an increasingly difficult area. Several respondents report that their congregations are facing "donation fatigue". The problem is especially bad in rural areas with dwindling (and ageing) populations and declining economic activity. It is likely to become worse as diocesan finances come under increasing pressure for a variety of reasons, as is happening at the present time.

1.6 Block Grants

1.6.1 A larger number of smaller value grants inevitably puts a strain on the funding body and adds to the cost of the administrative process. A number of individual private Charitable Trusts have responded to this problem by effectively delegating the responsibility for assessing applications and making awards to other funding bodies (especially where the originating trust does not have the necessary expertise). Such trusts therefore do not make awards themselves, but instead make block grants to other responsible grant-making bodies who are better able - or better placed geographically - to assess and monitor individual applications.

1.6.2 The author understands that the Heritage Lottery Fund has a commitment to retaining control of the grant-making process. Nevertheless he believes that a strong case could be made for annual block grants to be made to one or more responsible bodies such as the Historic Churches Preservation Trust or the Council for the Care of Churches. In Wales, under slightly different circumstances, a small number of private trusts and foundations feature prominently in applications for repair grants. Block grants to such organizations could presumably be "ring-fenced" to ensure that the ultimate awards complied with HLF / agency funding criteria. This would be an effective way of spreading HLF money wider - and more equitably - without adding to the administrative burden.

1.7 Repairs vs. Maintenance

1.7.1 It tends to be easier to attract grants for high profile repair work than for routine maintenance work, yet the fact remains that a significant proportion of the work necessary to keep a church in sound condition and open for community use, comes under the heading of "maintenance" rather than "repair".

1.7.2 Relatively low cost maintenance level work to replace a missing roof tile or service a central heating system can prevent very much more costly fabric repairs a couple of years later. The findings of this review amply bear out the adage that "today's maintenance is tomorrow's repair".

1.7.3 A re-analysis of the data originally collected for the *VAT and the Church Survey* indicate that ongoing maintenance expenditure on listed parish churches typically amounts to as much as approximately half the cost of repairs over a period of one year. On the evidence of this data, the author believes that a willingness to consider grants towards the cost of ongoing maintenance work might be an extremely cost-effective measure over the medium to long term. Perhaps, a “ring-fenced” block grant to an established grant-giving trust might be the most administratively efficient means of delivering such support.

1.8 Social and Community Use

1.8.1 The author understands the HLF’s reason for taking issues of social and community use into account as criteria for assessing grant eligibility. This clearly works to the benefit of those churches seeking funding to improve the use of the building as a focal point of community activity.

1.8.2 Given the formal remit of the Community Fund¹, which is “to help meet the needs of those at greatest disadvantage in society and to improve the quality of life in the community” the author wonders whether it might be appropriate to consider establishing a formal joint HLF / CF Scheme to help support such repair programmes which have this as their principal objective.



¹ As the National Lottery Charities Board has been known since April 2001.

2. Background

2.1 The purpose of this study is to feed into a broader review of policy and delivery of grant-aid scheduled by the Heritage Lottery Fund for later in 2001.

2.2 The criteria for eligibility for awards from the Joint Grant Scheme (referred to hereafter as "the Joint Scheme") which are being applied at the present time, have been necessary in order to control demand. Nevertheless there is still significant over-demand for the available funds.

2.3 There is some concern that the Joint Scheme as presently defined may be too narrowly targeted and that many potential applicants are not applying. It is further acknowledged that the rules for eligibility as presently defined may make tend to discourage applications on behalf of non-Anglican places of worship.

2.4 The Joint Scheme is nearing the final year of its 2nd Round and is due to come to an end in 2002. In the light of this, the HLF is anxious to consider issues of consistency in delivering grants to the sector across the whole of the UK.



3. Terms of Reference

3.1 It was agreed that this survey would be restricted to assessing the needs of listed buildings only, which were used as places of worship; grades I, II* and II (and their equivalents).

3.2 The present structure of the Joint Scheme is based on the findings of the *Churches Needs Survey*, published in August 1998.² The principal purpose of this study is to identify and quantify the needs of churches and other places of worship, essentially updating the information provided by the earlier survey.

3.3 The primary purpose of this study is not to provide a snapshot of expenditure at any one point in time, although inevitably some information of this nature will be generated. For this reason, the analysis is principally based on averages and distributions of expenditure, to provide a profile of "typical" needs. However some broadly-based estimates of grossed-up "global" needs are provided in Section 8.

3.4 This review will therefore seek to determine the needs of listed places of worship in terms of fabric repairs that might be eligible for funding from the Heritage Lottery Fund and the statutory and non-statutory agencies. It will also endeavour to assess needs in terms of ongoing maintenance charges.

3.5 So as to relate the findings as closely as possible to the present structure of the Joint Scheme, wherever possible the review follows the classification of work used in that context, ie. it distinguishes between:

- (a) urgent repairs (those needing to be carried out within a 1 – 2 year timeframe) and medium / longer term repairs (those with a 2 – 5 year timeframe);

² *Churches Needs Survey; A report of a survey commissioned by English Heritage and the Council for the Care of Churches*, Geoffrey R Claridge RIBA FRSA, August 1998.

- (b) those repairs which actually *need* to be done for essential conservation purposes and to enable the continued safe use of the building (roof, stonework etc) and those which the church authorities would simply *like* to do;
- (c) different categories of repair (in case this becomes an issue at some future time with regard to eligibility).

3.6 Although these distinctions are those generally adopted by the HLF and English Heritage, they are not always followed by the large number of non-statutory bodies which offer grant aid to places of worship – or indeed by places of worship themselves except when applying for HLF / EH grants. Therefore in many instances it was not possible to provide the desired level of detail in this study.

3.7 For the same reasons of consistency, as far as practicable the review will also define relevant terms in line with generally accepted practice in the sector. Thus for example:

- the “place of worship” will be the principal place of worship only; halls will only be included if they are physically attached to the main building, and used principally / exclusively for religious purposes;
- the review will cover work to the fabric of the building, but not fittings;
- work on toilets and other related facilities will be included only if it enables greater use to be made of the premises.

3.8 This review, like the Joint Scheme itself, is intended to be fully ecumenical in its remit. Where the word “church” is used, it should therefore be understood that it is being used as a shorthand to include chapels, synagogues, mosques, temples etc. ie. listed places of worship used by any religious denomination.



4. Structure of Review

4.1 The review brings together a mixture of pre-existing data and related material, together with new survey work and other research where appropriate.

4.2 The research itself comprises four distinct strands, each of which approaches the subject from the standpoint of one of the principal constituencies involved in the area. They are:

- **Strand 1** : Churches surveyed during the mid-1990s by the original *Churches Needs Survey*,
- **Strand 2** : Churches which are in the process of making an application to the Joint Scheme at the present time, or which have applied in the recent past;
- **Strand 3** : Churches which responded to the *VAT & the Church* survey commissioned by the Churches Main Committee in 2000;³
- **Strand 4** : The principal trusts, foundations and other bodies actively grant-aiding repairs to churches and other places of worship. This strand was further subdivided into two groups:
 - **Strand 4a** : The Historic Churches Preservation Trust and the individual County Historic Churches Trusts;⁴
 - **Strand 4b** : Other trusts, foundations and other grant-aiding bodies.

³ *The Impact of VAT on Church Properties; a Survey Commissioned by the Churches Main Committee*, Jeremy Eckstein Associates, 2000.

⁴ The County Historic Churches Trusts are all independent charities. They have no financial link with the Historic Churches Preservation Trust, although, in many cases, the Historic Churches Preservation Trust, the Incorporated Church Building Society and the County Historic Churches Trust may help the same church.

4.3 In addition to the four distinct formal strands of the research, there is effectively a fifth strand or element. This comprises ad-hoc analysis which does not fit neatly into either of the four defined strands, together with some "soft research" into specific aspects of the study which do not lend themselves readily to formal analysis.

4.4 It will be seen that Strands 1, 2 and 3 approach the subject from the standpoint of the churches which carry out repair work and seek funding assistance. Strands 4a and 4b approach the subject from the standpoint of the grant-making trusts and other bodies which offer that assistance. Strand 5 covers evidence from both sides of the equation.

4.5 The various strands of the research should be seen as distinct, parallel elements of the overall investigation. Taken on their own, they give a particular insight into the subject matter of the review, from their own individual perspectives. Taken together, they help to give a composite picture of the needs and problems faced in meeting the costs of upkeep – repairs as well as maintenance - of listed buildings used as places of worship⁵ across the United Kingdom at the present time.

4.6 Where relevant, this review draws on data and other material relating to the period covering the past two years. This is consistent with the objective of providing an assessment of needs rather than a snapshot of expenditure at a particular point in time (see para. 3.3 above). It will also avoid any anomalies that might have arisen by concentrating on a single 12 month period, especially since in many instances special millennium expenditure may well have distorted the normal pattern of annual expenditure on repairs.

4.7 It is in the nature of the sector as a whole, and the various bodies approached for information, that the findings of the research derived from the different strands will not always agree precisely. Given that the objective of this survey is to provide a composite picture of

⁵ The phrase "listed buildings used as places of worship" is that adopted by the Chancellor of the Exchequer in his November 2000 Pre-Budget Report, when he first indicated that "the Government was attracted to the idea of a reduced rate of VAT for the repair and maintenance" of such buildings.

needs, rather than a purely mathematical assessment of various categories of expenditure, this element of inconsistency does not necessarily undermine the validity of the findings as a whole. In fact the inconsistency may be seen as an expression of the sometimes contradictory voice of the bodies comprising the sector.

4.8 In the process of providing some broadly-based estimates of grossed-up "global" needs, a comparison and reconciliation of the data derived from different sources is also provided in Section 8.



5. Methodology

5.1 Strand 1

5.1.1 The original *Churches Needs Survey* was based on an assessment (in the mid-1990s) of the physical condition and needs of 137 churches in five deanery (or deanery-sized) areas within the dioceses of Gloucester, Newcastle, Manchester, Portsmouth and St Edmundsbury and Ipswich.

5.1.2 For the purposes of this review, a sample of approximately 50 of the original churches was selected.⁶ Each was sent a questionnaire which sought to determine: (i) the accuracy of the original needs assessment; (ii) how much of the work assessed as being necessary was actually carried out; (iii) what work was not carried out as recommended, and why; (iv) the likelihood of outstanding work being completed; and (v) details of unplanned emergency work which was not anticipated by the earlier assessment. The questionnaire was accompanied by a copy of the assessment drawn up in connection with the original *Churches Needs Survey*.⁷

5.1.3 The letters to Anglican churches were addressed to the church treasurers by name, or where this was not known, to the unnamed treasurer c/o the priest. Letters to Roman Catholic churches were addressed to the appropriate Diocesan Treasurer. A copy of the questionnaire, with accompanying letter, is reproduced in Appendix A of this report.

5.1.4 The areas in the original survey were chosen to reflect a representative cross-section of parishes found in the country as a whole. However the findings were, strictly speaking, limited to England and were never extrapolated to cover the whole of the UK. The same

⁶ Approximately 1 in 3 of the original sample, augmented as necessary to achieve the required number.

⁷ This in itself was a useful exercise, as a number of the recipients replied that they had never seen this assessment before, and found it extremely useful.

geographical restriction therefore applies to the results of this latest assessment.

5.1.5 The 137 places of worship included in the original survey were predominantly Anglican parish churches, but also included a number of non-Anglican centres – Roman Catholic and United Reformed Churches and one Jewish synagogue. As far as possible, this mix was preserved in the sample taken for this present survey, which included a number of Roman Catholic churches, five URC churches, and the one synagogue.

5.1.6 The findings from this Strand of the study are set out in Section 7.1 of this Report.

5.2 Strand 2

5.2.1 This strand of the research was derived entirely from the analysis of existing data; no new questionnaire-based or other research was undertaken.

5.2.2 English Heritage provided a schedule of applications to the Joint Scheme from listed places of worship over the 24 month period from April 1999 to March 2001. The schedule comprised a total of approximately 1,265 individual applications, from which a random sample of 1 in 25 was drawn to give a total sample of 50 cases.

5.2.3 A number of churches had submitted more than one application during the period – normally for a first and subsequent second phase of a large ongoing restoration programme. Such “Phase II” applications were excluded when selecting the cases for analysis, but multiple applications from any given selected church were brought together for the purposes of the analysis, provided they were made during the designated time period.

5.2.4 The large majority of applications were for Stream 1 Scheme grants, from grade I or II* listed Anglican churches. No attempt was made to use a stratified sampling process which yielded precisely this same balance of Stream, listing grade and religious denomination in the sample of cases selected for analysis, nor to reproduce the same

regional distribution of cases.⁸ Details of the distributions according to these characteristics, for all applications and for the selected sample, are shown in Table 6 below.

5.2.5 The material provided by English Heritage for each case consisted of a copy of the Joint Scheme application form, together with a current Quinquennial Inspection Report (typically dating to the middle or late 1990s). In several cases the "Architect's or Surveyor's Standard Repair Report" was also included, a small number of which analysed and costed the repairs in detail according to category and priority.

5.2.6 The findings from this Strand of the study are set out in Section 7.2 of this Report.

5.3 Strand 3

5.3.1 The survey on which this strand of the present review is based, was conducted during 2000. It gathered a range of financial information relating to expenditure on repairs and maintenance by churches for the most part during calendar year 1999.⁹

5.3.2 The principal features of this study were that:

- It was designed to cover a range of Christian denominations, namely • the Church of England; • the Church of Scotland; • the Church in Wales; • the Presbyterian Church in Ireland; • the Roman Catholic Church; • the Baptist Union; • the Methodist Church; • the United Reformed Church; and • the Free Churches Council.¹⁰

⁸ The justification for this is that the numbers of cases with the minority characteristics would necessarily be so small that the results could not be said to be statistically significant.

⁹ The large majority of cases related to calendar year 1999. A small proportion provided data relating to a different 12-month period (most often their accounting year ending in 1999 or 2000).

¹⁰ In the event, for logistic reasons, the survey failed to provide robust data relating to either the Church in Wales or the Roman Catholic Church.

- By virtue of the above, it provided data relating not just to England but also to Scotland and Northern Ireland.
- It covered cathedrals and “greater churches” as well as parish churches.
- Because the remit of the study had to do specifically with the payment of VAT, it covered churches of all architectural standing, both listed and unlisted.

5.3.3 The database on which the findings were based, consisted of some 2,400 questionnaires completed in respect of more than 3,700 churches.¹¹ For the purpose of this review, the database was refined / filtered as follows:

- (a) A number of the original entries had particular features requiring special analysis. These were excluded from the present review.
- (b) For the sake of simplicity, questionnaires completed in respect of more than one church were excluded from the present review.
- (c) Only responses from parish churches were included in this review. Responses from cathedrals and “greater churches” were excluded.
- (d) Only churches with a known listed grade were included in this review. Unlisted churches, and those which were reported as being listed, but with an unknown grade, were excluded.
- (e) A number of respondents to the original survey reported that no repair work had been carried out during the period under review. These were excluded from this review.

5.3.4 These five “pre-filters” reduced the database to 798 questionnaires, completed in respect of the same number of churches –

¹¹ Depending on diocesan financial reporting protocol, a small number of questionnaires were completed in respect of more than one church.

all straightforward responses from individual listed parish churches in England, Scotland and Northern Ireland, which had carried out repair work during calendar 1999. This reduced database formed the basis for the analysis carried out for this review. As in the case of Strand 2, no new questionnaire-based or other research was undertaken.

5.3.5 The analysis of this reduced database was undertaken on two levels:

(a) Basic analysis of the data that had already been recorded – denomination, region, grade of listing, total repair and maintenance costs – was carried out on the complete reduced data set of 798 churches.

(b) In order to obtain further detailed information regarding the nature of the repairs carried out, a random sample (comprising 309 churches altogether) was drawn from the reduced data set. Additional previously unrecorded information was drawn from the original questionnaires relating to this sample, where they gave answers in sufficient detail (230 churches).

5.3.6 The findings from this Strand of the study are set out in Section 7.3 of this Report.

5.4 Strand 4a

5.4.1 This Strand of the study involved sending a letter and questionnaire to the Secretary (or occasionally the Treasurer) of each of the 33 County Historic Churches Trusts in England.

5.4.2 The Historic Churches Preservation Trust was not included in this Strand of the study, but in Strand 4(b), details of which appear in Section 9 below.

5.4.3 The questionnaires requested information about grants made to churches during the previous 24 month period.¹² Specifically,

¹² See Section 4.4.

information was requested regarding: (i) the number of churches to which grants were made during the period; (ii) the Trust's funding priorities; (iii) details of individual grants (including classification and priority of the work - using the Joint Scheme classifications - if known) and; (iv) other known sources of funding.

5.4.4 A list of the Trusts, together with a copy of the letter and questionnaire, is reproduced in Appendix B of this Report.

5.4.5 The findings from this Strand of the study are set out in Section 7.4 of this Report.

5.5 Strand 4b

5.5.1 This Strand of the study involved sending a letter and questionnaire to the Secretary (or other named contact) of a selection of 50+ grant-making trusts around the country. The trusts were not chosen at random. They were the trusts identified in the latest (2001) edition of the Architectural Heritage Fund's *Directory of Sources* as being trusts which supported repair work to places of worship. Although the resulting list of trusts does not pretend to be complete, there is no reason to believe that it does not constitute a representative sample of the whole body of such trusts.

5.5.2 Strictly speaking the Architectural Heritage Fund's *Directory* covers funding sources in England and Wales only. However it does not exclude grant-making trusts which cover other parts of the UK, providing they also cover England and / or Wales. The result is a mix of trusts, ranging from some which are even more geographically specific than the County Historic Churches Trusts, to others which have no geographical constraints whatever with regard to their grant-making policy. The questionnaire for this study was sent to all the identified trusts, without attempting to draw a geographically representative selection.

5.5.3 In all material respects, the objectives of this questionnaire and the period covered, were precisely the same for these miscellaneous trusts as for the County Trusts surveyed as Strand 4a of this study.

5.5.4 It should also be remembered that some – perhaps the majority – of the trusts identified in this Strand of the study, have grant-making remits which cover a wider range of activities than supporting repairs to places of worship. Some simply include places of worship within a broader heritage interest, while others include heritage among a wider range of socially responsible interests altogether. No attempt was made by this study to determine what proportion of any given trust’s overall expenditure was directed towards places of worship.

5.5.5 The list of trusts to which the letter and questionnaire was sent, is shown in Appendix C of this Report. The letter and questionnaire sent to the trusts was the same as that used for Strand 4a (the County Historic Churches Trusts) subject only to minor modifications to the wording, as appropriate. These are therefore not reproduced again.

5.5.6 The findings from this Strand of the study are set out in Section 7.5 of this Report.

5.6 Strand 5

5.6.1 Technically speaking, there is no formal methodology for Strand 5 of this study. It comprises a selection of *ad-hoc* material which is relevant to the matter under review, but which did not fit neatly into any of the four principal strands of the study in terms of methodological approach.

5.6.2 It is evident that the principal formal data sources in this area relate to the Christian Church in England. In an attempt to redress this unintentional but nevertheless unavoidable bias, approaches were made by telephone and letter to bodies representing other denominations and other countries within the UK, requesting information relevant to the remit of this study. The bodies contacted were:

- The Church of Scotland;
- The Church in Wales;
- The Church in Ireland;

- The United Synagogue;
- The Jewish Memorial Council / Survey of the Jewish Built Heritage;
- National Association of Hindu Temples;
- The Islamic Centre of England.

5.6.3 On being informed of this study, the Church of England volunteered some additional data produced by its Research and Statistics Department. The Church of Scotland was unable to provide any information, but referred the enquiry to Historic Scotland, from which a helpful response was received. The Representative Body of the Church in Wales undertook a special analysis of grants made by its Fabric Repair Fund during the relevant period. The Church in Ireland was unable to provide any further information by the deadline for submitting this report. The United Synagogue responded with a helpful letter but was unable to provide any robust statistics. No replies were received from either the Hindu or Moslem bodies.

5.6.4 In the event, this Strand therefore comprises material from:

- The Church of England;
- Historic Scotland;
- The Church in Wales;
- Representative Jewish bodies.

5.6.5 This Strand also contains information about funding available under the Landfill Tax Credit Scheme (managed by Entrust).

5.6.6 The findings from this Strand of the study are reviewed in Section 7.6 below.



6. Responses

6.1 General Observations

6.1.1 The response to the questionnaire-based strands of the survey was generally extremely good. Many replies were accompanied by letters attesting to the seriousness with which the respondents viewed the subject matter of the research. Given that the majority of respondents were unpaid church treasurers, or short-staffed trusts, the level of time-consuming detail contained in a number of the responses is testament to the seriousness with which the respondents undoubtedly view the matter of grant-aid for churches.

6.1.2 The large majority of respondents accepted the legitimate need to ask questions which involved them in considerable work, and the time constraints imposed by the exercise, with a measure of good grace. A number wrote apologetically to explain that the task was more than they could undertake (invariably because of their limited resources). Only a very small minority felt strongly enough to write or telephone to say why they absolutely wouldn't (rather than couldn't) complete the questionnaire.

6.1.3 By contrast, a number of the respondents took the opportunity, by telephone and by letter, of going further than the questionnaire and unburdening themselves on the difficulties they face in financing repairs to listed churches, and a number of their comments appear in the anecdotal / case study sections of this report. Many were more critical of the *status quo* than they might have been had the survey been undertaken by either of the commissioning bodies.

6.1.4 A number of the general trusts in particular, welcomed this survey, saying that they frequently felt that they were working in the dark, and would find a review of the broader picture of support for places of worship enormously helpful in terms of better framing their own policies and funding priorities.



7. Findings & Observations

7.1 Strand 1

7.1.1 The original sample of 53 churches was reduced to 47 because neither the United Reformed Church nor the United Synagogue were able to provide the requested information which would have allowed the questionnaires to be sent out within the required time frame. The 47 churches to which questionnaires were ultimately sent consisted entirely of Anglican and Roman Catholic churches - 45 and 2 respectively. Altogether, responses were received from 30 of these churches - a response rate of 64%.

7.1.2 Unfortunately, there is good circumstantial evidence¹³ to suggest that it is not valid to assume that the experience of places of worship used by other denominations in this context is the same as that of Anglican churches. This advice was given principally in relation to Jewish synagogues, but there is no reason *a priori* to suppose that it doesn't apply equally to other non-Anglican / non-Christian denominations. It would therefore be proper to assume that strictly speaking this strand of the research relates only to the experience of Anglican churches.

7.1.3 The original *Churches Needs Survey* on which this strand is based, covered England only. It is not possible on the basis of this survey to give an opinion as to how relevant the findings may be to other denominations in other countries within the UK.

7.1.4 According to the original Churches Needs Survey, the estimated aggregate cost of the likely repair needs of the 53 sampled cases in the period 1995 - 2000 and beyond amounted to £3.381 million. Details are shown in Table 1. The 30 churches responding to this survey accounted for £1.128 million (33%) of the total costs.

7.1.5 It will be seen from Table 1 that only 9.4% of the total cost related to urgent high level and other work, in other words to work which was likely in principal to be eligible for funding assistance from

Not typical
original survey

not typical

50k pack
230k

¹³

Source: Sally Embree, English Heritage.

urgent
work
↓

the Joint Scheme. The remainder of the cost related to medium term (34.1%), deferrable (39.2%) and minor work (1.4%)¹⁴.

7.1.6 Only 29 of the 53 churches were reported as being in need of minor work. In 10 of these cases the estimated sum involved was just £500 and in a further 8 cases it was £1,000 – all relatively affordable sums even by the modest standards of parochial budgets. Only two churches were reported as having a need in excess of £5,000 in this respect.

? 30

7.1.7 The estimated cost of work which was assessed as being major and urgent for the 53 churches is shown in Table 2. Fewer than half (41.5%) of the churches were assessed as needing any work of this nature done. Of those which did, the majority were in need of work estimated to cost no more than £5,000 (13.2% of the sample, 32% of those needing work done) of this nature. Just 15.2% of the sample (approximately one in six cases) were assessed as being in need of urgent major work estimated to cost in excess of £25,000 with a small core of fewer than 4% (equivalent to no more than around 1 church in 25) requiring urgent work costing more than £40,000.

7.1.8 It is significant that fewer than half of the churches surveyed were assessed as requiring urgent major works. Although a small minority of churches are faced with significant levels of urgent / immediate repairs, for the most part urgent repairs tend to be modest in terms of their extent and estimated cost.

7.1.9 This suggests the existence of a culture of "make do and mend" in response to repairs – an understandably realistic and pragmatic approach, given the difficulty of meeting the costs involved. For many churches, the only repair work which tends to be carried out, is work which absolutely has to be done; more extensive / expensive work tends to be put off until it becomes unavoidable, by which time – hopefully – funding will have become available.

69
47?

7.1.10 Indeed, looking over a longer time perspective, a larger proportion of the churches were assessed as needing medium-term

¹⁴ 16.0% by cost related to work which was not properly classified with regard to level of urgency.

repair work than urgent work¹⁵ (83.0% compared to 41.5%). Details are shown in Table 3. Although in 28.3% of cases the total cost of the work was assessed as being less than £10,000 and in 45.3% of cases it was less than £15,000 there was a significant proportion (11.2% or approximately one in nine churches) for which the aggregate cost was assessed as being £50,000 or over.

7.1.11 Approximately two out of every three churches (69.8% - see Table 4) were assessed as requiring major work of so little urgency that it could legitimately be referred to as "deferrable".¹⁶ However for those churches which did require such work, the average costs were far from trivial. The total cost of such work was assessed as being under £10,000¹⁷ in only 15.0% of cases, while in 9.5% of cases (almost one in every ten churches) the figure was £50,000 or more.

7.1.12 Table 5 brings together all the required work – minor and major, urgent, medium term and deferrable – and shows the distribution of the resulting aggregate figures. There was not a single church in the sample which did not have some identified repair need when taking a view extending beyond a five-year time horizon. The total estimated cost of the work (at current prices) was less than £15,000 in fewer than one case in three; in more than one case in three (35.7%) the total estimated cost amounted to £50,000 or more.

7.1.13 Bringing this information together to establish an overall profile of the sampled churches in terms of their assessed repair needs, it is important to note that the three timescales – "Urgent", "Medium Term" and "Deferrable" – are not mutually exclusive in terms of the needs of individual churches. Only around one church in three was assessed as requiring work which fell into just one of the three

¹⁵ Within the context of the Joint Grant Scheme, "Urgent" work is defined as work requiring to be done within 2 years, while "Medium Term" work is defined as work requiring to be done within 2 – 5 years.

¹⁶ Defined within the context of the Joint Grant Scheme as being work for which the timescale is in excess of 5 years – in practical terms, this effectively means work which does not need to be carried out for at least 5 years.

¹⁷ Here and elsewhere in this report, all estimated costs are expressed at current prices.

timescales; a further one in three was assessed as needing work which fell into two of the timescales and a further one in three required work assessed as spanning all three timescales.

7.1.14 The overall state of affairs therefore is, not surprisingly, one of churches typically facing a range of repairs ranging from those which are urgently required in order to preserve the fabric of the building, or deemed essential to ensure its continuing use, to those which will clearly need doing at some time in the foreseeable future, but which can safely be deferred for five years or more without any critical adverse consequences.

7.1.15 From the evidence of the survey findings, it is clear that meeting the cost of repairs is a serious problem for many churches. In spite of the fact that the median¹⁸ estimated costs are just £11,000 per church for urgent work and £12,000 per church for medium term work, financial problems are frequently cited as among the principal reasons why work identified by the *Churches Needs Survey* was not carried out as recommended.

7.1.16 Unfortunately in the majority of cases the responses to the survey questionnaires distributed as part of this present survey do not lend themselves readily to a direct comparison between the assessment of needs identified by the earlier *Churches Needs Survey* and the repair work actually carried out thereafter. However the real strength of the present responses lies in the wealth of "anecdotal evidence" they contain, which is frequently as important as the figures themselves. A selection of this material follows below (statements in italics and

¹⁸ The median is defined as the value above and below which half the cases fall. It is a measure of central tendency not sensitive to outlying values - unlike the mean (which is simply the average of a set of values, and which can be affected by a few extremely high or low values). In circumstances where the distribution may be markedly skew - as it is frequently with data relating to repair costs - the median probably gives a more helpful indication of "typical" costs than the mean, or average figure.

A large difference between the two measures (normally the mean being greater than the median) usually indicates the presence of a number of large outlying values.

enclosed in inverted commas are presented in the words of the respondents, or a close paraphrase):

Key Point

- With very few exceptions, the assessment of needs indicated by the *Churches Needs Survey* had proved to be generally accurate. However in a significant number of cases the cost of actually carrying out the work was considerably higher than the estimated figure – and the difference was not simply a matter of inflation in building costs.

- The two principal reasons why work recommended by the earlier survey had not been carried out, were:

- (i) inability to raise the necessary money, principally as a result of shortfalls in fundraising; and

- (ii) re-assessment of priorities arising as a result of unforeseen other urgent work (for the most part, roof / structural) eg. *“Changed priorities resulting from unplanned emergency work inevitably led to shortfalls in fundraising”; “All recommended work has been deferred, as the money is needed for other more urgent repairs”; “work on guttering and downpipes was not attended to, mainly because of unanticipated need for re-wiring, heating and lighting (£10,000) and redecoration (£8,000)”*.

- There are some examples of innovative thinking in the search for financial aid eg. organ restoration part-funded with the help of grants from the Arts Council and the Foundation for Sport and the Arts.

- Self-help is a vital component in the financial of many parishes, eg. *“Both areas were redecorated at no cost – by volunteers, using donated materials”* and *“All work completed according to assessment, by volunteer workers with help of skilled mason”*.

- *“There is little likelihood of major work being done, as the church is having difficulty in meeting even its day-to-day maintenance costs.”*

- There were frequent references to a shift of priorities: *"The (assessed recommended) work was not carried out because funds were tight and the fabric was not noticeably deteriorating. Medium-term repairs are now considered long-term".*
- *"The assessment generally underestimated the actual costs. A lot of extra work had to be carried out on the roof. As a result, much interim redecoration still needs doing, and work on windows will have to be deferred to later date. Failure of earlier below-standard roof repairs incurred extra cost to put right, and are causing continuing concern."*
- The recommended timetable for repairs was frequently an irrelevance: *"All work was generally carried out as funds became available".*
- *"None of the work was actually done - not a rosy picture, but we do our best."*
- Some responses paint a bleak picture, typically: *"The state of the church has been discussed on a number of occasions, and attempts made to secure funding for modifications / repairs, but with limited success."* Others show a perhaps naïve faith in the future, in spite of the evidence of the past, eg. *"Main reason for postponement was lack of available funds. The intention is that this will be attended to in the near future".*
- *"No major work was identified as being required. However there is currently a requirement for £15,000 for organ repairs, £11,000 for re-wiring and £6,000 for stonework on gables - £32,000 in all, for which we have available funds amounting to £12,000."*
- *"Necessary work on aisle roofs was done, with connections to gutters / drains. Funds were raised by the congregation, with no grants except one small one from the diocese. Remaining work awaits further fund-raising - delayed because of emergency work. Critical jobs will take precedence; unlikely to have recouped funds within 5 years,*

so the interior work will have lowest priority. The aisle and porch floors have begun to collapse, due to settlement and serious fractures. This is being tackled, at a cost of approx. £20,000 – all being raised by the congregation.”

- *“Following massive water penetration, work was carried out to repair / replace sections of roof, at a total cost £12,000 – of which £8,500 was raised locally. Medium plan is now to carry on improving water run-off / roof. Funding is now a problem, as total cost was estimated at £50,000 and grant-aid is no longer available. We are trying to complete fundraising for a new hall, so efforts to continue with repairs will have to cease until that is done. We will not re-start fundraising for fabric repairs until 2002.”*

- *“Shortfall in fundraising, as a result of an astronomic increase in clergy costs.”*

- *Following a major fundraising initiative for urgent repairs: “The fundraising team was exhausted by the end of Phase II, and were given five years to recuperate and enjoy what they had achieved”.*

- *“Nothing was identified as deferrable at the time, but a number of potentially serious problems have subsequently arisen which will need attending to within the next two years as a matter of urgency, so that other medium-term work will inevitably have to be deferred.”*

7.1.17 The general conclusion to be drawn from this material, is that all too often financial constraints cause congregations to adopt a “knee jerk”, reactive response to the fabric needs of their churches, notwithstanding the opportunities for a more considered pro-active approach offered by a Quinquennial Inspection. The concept of a “stitch in time” approach to repairs, by which modest expenditure now can save the need for more extensive repairs at a later date, may be fine in theory, but simply not possible in practice when there are barely sufficient resources available even for essential immediate work.

7.1.18 This observation is supported by the evidence of other strands of the research for this study, and leads to one of the principal findings of the review (see Section 8.1 below).

7.2 Strand 2

7.2.1 Table 6 compares the applications submitted to English Heritage for grants under the Joint Scheme with the cases selected for further analysis, in terms of their distribution by EH region, religious denomination, grade of building and application grant stream.¹⁹

7.2.2 It will be seen that the selection process failed to capture any of the non-Anglican applications to the Joint Scheme. However, since such applications accounted for less than 7% of the total during the 2-year period under review, this omission does not impact negatively on the validity of the analysis which follows.²⁰

7.2.3 Table 6 shows that the sample broadly reflects the other characteristics of the applications – region, grade and grant stream – to an acceptable degree. However with regard to regional coverage, it should be noted that by the nature of the originating data, the sample results technically relate to churches situated in England only.

7.2.4 The applicants comprising the sample submitted applications in respect of projects costing £5.3 million in aggregate, of which £4.8

¹⁹ **Stream 1:** total project costs between £10,000 and £250,000 for urgent repairs to grades I and II* churches anywhere in England. **Stream 2:** total project costs between £10,000 and £250,000 for urgent repairs to grade II churches, priority given to deprived areas. **Stream 3:** total project costs between £10,000 and £250,000 for non-structural projects to churches of any grade, priority given to deprived areas. **Stream 4a:** total project costs of £250,000 or more for any projects to churches of any grade, priority given to deprived areas. **Stream 4b:** total project costs of £250,000 or more for urgent repairs to grade I or II* churches, priority given to areas not classified as being deprived.

²⁰ Even if the non-Anglican denominations were included in the sample, it would be impossible to reflect the varied characteristics of this heterogeneous group in a statistically valid manner in just 3 or 4 cases - the "average expected" representation in the sample.

million (91%) consisted of either "high level structural repairs" (£4.4 million) or "repairs to historic fabric at risk of imminent loss" (£0.4 million). This emphasis is not surprising, given the distribution of the applications in terms of grant stream (Table 6). No other single category of work (as defined in Section 9 of the Joint Grant Scheme Application Form) accounted for more than 3% of the aggregate figure; the largest was "Non-structural projects: Access" which accounted for 2.8% of the total.

7.2.5 Table 7 shows the mean and median amounts of applications to the Joint Scheme. In the majority of regions the two figures are close enough so as not to warrant any further investigation. The differences between the two measures in the South West, West Midlands and Yorkshire regions points to a small number of applications for substantially larger sums of money than the norm.

7.2.6 Perhaps surprisingly, the listed status of the church does not appear to be a significant determining factor with regard to the total amount of the grant application, as demonstrated by the figures in Table 8. Indeed a formal statistical test demonstrates that statistically there is no significant difference between the mean amount sought by churches which are listed grade I or II* and those which are grade II,²¹ although the numbers involved in the latter case are too small to attach a strong degree of confidence or significance to the statement.

7.2.7 Tables 9 and 10 follow from Tables 7 and 8, but show corresponding information in respect of the sums sought by Joint Scheme applicants.

7.2.8 Table 11 shows the ranges of the project costs and amounts sought, analysed according to application grant stream.²² The figures for applications made under Stream 1 cover the whole range of project

²¹ Where the means of two samples are compared with reference to a common variable, the Independent t test is generally used, with the acceptance level of $\alpha = 0.05$. In this case, $t = 0.809$, $p = 0.449$.

²² Given that applications under Streams 2, 3, 4a and 4b together account for only 25% of the sample (11 cases) the percentages shown in Table 11 under these columns are not particularly meaningful, since for the most part they represent single cases only.

costs up to the ceiling of £250,000. Almost 40% of applications were in respect of projects costed at £100,000 or more, although the greatest concentration was in the £25,000 - £50,000 range (23.7% of applications).

7.2.9 The Stream 1 grants applied for, show a broadly similar pattern, with a strong emphasis on grants in the £25,000 - £50,000 range (27%). There is a marked tapering-off at higher ranges, with only 24.3% of applicants seeking grants of £100,000 or more (compared to 40% of project costs). This implies that applicants for more expensive projects tend on average to seek grants covering lower proportions of the cost than applicants for less expensive projects. However this is not a statistically significant feature of the data.²³

7.2.10 On average, the grants sought by the sampled Joint Scheme applicants were approximately 66% of the corresponding total project costs; both mean and median measures yield this same proportion.

7.2.11 The applications reviewed for this survey were not always clear about how the balance of the project cost was going to be raised. Only 31 (around 60%) applicants had entered any other funding source in para. 9.7 of the Application Form ("What do you hope to raise from other sources?") and only 24 had entered two or more sources. Even where additional funding sources were given, they did not always include firm amounts of money, and fewer still were able to report that the funding had already been secured. Clearly as far as some applications were concerned, the raising of money from other sources was still very much a hope rather than an expectation, let alone a secured *fait accompli* at that stage of the application process.

7.2.12 A number of applications made it clear that the offer of contingent grants posed certain problems. Where grants from one funding source were in some way dependent or contingent on the amount of grant being received from another source it was difficult to fix

²³ Pearson's *r* (one or two tailed, as appropriate) is generally used for testing formally for correlation between two variables. In this instance, the data yields the non-significant values: $r = 0.071$, $p = 0.320$.

a starting date or timetable for repair work. The difficulty was exacerbated by the length of time taken to process applications to certain bodies.

7.2.13 Where additional funding sources were mentioned by name, the two most common sources by a wide margin were the Historic Churches Preservation Trust and / or the local Historic County Preservation Trust. Together these accounted for 25 of the 59 specific mentions of other sources. Further details are shown in Table 12.

7.2.14 Two features of the specific named sources are worth mention:

- Only ten trusts are mentioned specifically by name. This is substantially fewer than the number mentioned in the Architectural Heritage Fund's Directory of Funding Sources²⁴ as being ready in principal to support repair work to listed churches. The Directory contains a great deal of useful advice regarding the funding of repairs to historic buildings in general, and it might be appropriate to recommend it to applicants to the Joint Scheme.
- Two applications named Entrust (the regulator of the Landfill Tax Credit Scheme) as their chosen additional source of funding. This scheme allows for the support of projects for the repair or restoration of places of religious worship and although it might not be an obvious choice of funding partner, significant sums are available. For those churches which are eligible to apply – ie. those which lie within the designated catchment area of a landfill site – it may well represent an extremely worthwhile opportunity so long as funds continue to be available (see para. 7.6.7 below).

7.2.15 Only two of the applications failed to give any details about their own fundraising support for the projects for which they were seeking grants. A number had substantial sums (£10,000 or more) in their Fabric Funds or other resources which they were going to put

²⁴ *Funds for Historic Buildings in England and Wales*, Architectural Heritage Fund, annual.

towards the cost of the work, and had expectations (or at least hopes) of raising the balance by further – largely unspecified – fundraising efforts within the community and involving the community. However, a small but articulate number were honestly and realistically pessimistic about the prospects of local fundraising efforts, largely due to “appeal fatigue”, as evidenced by the following comments:

- From a Stream 1 application for a grant of 65% towards the total cost of £40,943 for roof work and repairs to the tower of a grade II* listed church to prevent further deterioration and the collapse of the parapet: *“This is largely a farming / retired community with limited resources, badly affected by the current agricultural crisis. We have undertaken fundraising appeals for other projects in the recent past. Due to the small size (~250 people) and the economic status of the parish, it is simply not practicable to have a constant stream of appeals.”* In these circumstances, it is not surprising that the application gave little further information about plans for meeting the shortfall between the grant it was seeking and the total cost of the project.

- From a Stream 4a application for a grant of £685,290 towards the total cost of £806,290 for major repairs to a grade II listed church “to arrest its serious decay, make it weatherproof and improve its external appearance”: *“This is a poor parish in an area of great social decline. It is soon to be designated an “Objective 1” region by the European Union. Coal mining has now ceased. The village was solely dependent on this industry. There is high unemployment, social decay and considerable poverty. There is very little social and cultural provision and a deteriorating environment. We have been fundraising since 1991 and local support, though good, is largely exhausted. Nationally, we have approached 48 “most likely” organisations; to date 32 rejections and one offer of £2,000 – we will continue this search”.* It is not practicable to set up a Friends’ organisation, as the church is situated in an Urban Priority Area parish. Fortunately the church has secured a grant of £75,000 from the local diocese, and will draw on its existing Fabric Fund as

X

necessary to meet the balance of the cost of the project (up to £44,000).

- From a Stream 2 application for a grant of 70% towards the total cost of £53,900 for essential work to a grade II listed church, to prevent its eventual collapse, for the use of the local community (the building is presently closed because of the danger from falling plaster): *"Our own fundraising ability is limited by the fact that we are a small rural community in a sparsely populated area"*. The Fabric Fund presently amounts to no more than around £6,000. Applications have been made for funding support to the Historic Churches Preservation Trust and the local District Council, but no firm offers had been received at the time of completing the Joint Scheme application form.

- From a Stream 3 application for a grant of £3,670 towards the total cost of £7,870 for repairs to the organ of a grade II* listed church: *"This is a small rural community of limited means, deeply affected by the decline in farming incomes, with attendant examples of rural poverty and deprivation"*. Additional grants had been sought from the Council for the Care of Churches (£2,000) and various charities (£500) but the outcomes of these applications were not yet known. The church's Millennium Project Fund was already committed to another project.

7.2.16 The problems resulting from rural deprivation / urban decline coupled with low or declining populations is a common theme in many applications. Another common theme is community benefit, for example:

- From the Stream 2 application referred to above: *"It will reinstate the church for the use of the local community"*.

- From a Stream 3 application for a grant of £29,000 towards the total cost of £70,000 for the installation of facilities in a grade II* listed church to enable use of the building by children, disabled and ethnic minority groups: *"At present the church remains shut for most of the week. It's*

long term future depends on a lively and growing congregation. This project seeks to open up the church to 7-day use, encouraging its congregation to serve the community with the whole of its facilities".

7.2.17 The fact that community benefit is one of the criteria used for assessing eligibility for Joint scheme grants raises other issues, which are discussed in more detail elsewhere in this report.

7.3 Strand 3

7.3.1 Note: because of the "pre-filtering" carried out on the database of the original *VAT and the Church Survey* (see para. 5.3.3) the results of that survey are not strictly valid in the context of this new survey.

7.3.2 The basic characteristics of the sample of 798 churches analysed for this study, are set out in Table 13. It should be noted that they represent the distributions of denominations and listing grades as they appear in the sample; they are not intended to be representative of the distributions in the population of listed churches as a whole around the country.²⁵

7.3.3 Total annual repair costs and maintenance costs per church are shown in Tables 14 and 15 respectively.²⁶ Table 16 shows the variations between different dioceses for Church of England churches (all listing grades together). Note that these figures relate to annual expenditure, not to project costs: it is not possible to derive the latter reliably from the former from the data available.

7.3.4 The fact that in most cases the mean figure is substantially greater than the median, indicates that the results are skewed by a number of high values. The extent of this distortion may be seen from

²⁵ This is not a matter of concern, since this survey will not seek to draw any conclusions based on aggregated figures.

²⁶ Here and elsewhere in this section, all expenditure figures are stated inclusive of VAT.

the distributions of expenditure shown in Table 17. Data is shown for the Church of England, the Church of Scotland and the Irish Council of Churches. There are too few churches in the sample relating to any of the other denominations for the distributions to be meaningful. However it should be noted that even though there were only five responses from members of the Church in Wales in the sample, one had spent well in excess of £250,000 on repairs during the year in question.

7.3.5 Table 17 shows that 69.2% of the Church of England sample, 68.8% of the Church of Scotland sample and 58.2% of the Irish Council of Churches sample had spent £10,000 or less on repairs during the year. Similarly 84.5%, 76.3% and 58.5% respectively had spent £5,000 or less on ongoing maintenance. These figures tend to reinforce the evidence of the Strand 1 data, regarding the relatively modest sums expended on repair work by a large proportion of "ordinary" listed parish churches.²⁷

7.3.6 Table 18 compares expenditure on repairs and maintenance for the full reduced sample of churches. It shows that maintenance charges typically²⁸ account for a significant proportion of the total expenditure bill (ie. repairs plus maintenance). This demonstrates how difficult it is for some churches when maintenance charges are excluded from the range of allowable expenditure when seeking grant-aid support, especially when, in many instances, it is sometimes difficult to demarcate clearly between the two categories over a period of time.

7.3.7 Moving from analysis of the full reduced data set to the selected sub-sample (see para. 5.3.5(b) above) Tables 19 and 20 show data relating to repairs broken down into six different categories, where this information was adequately detailed in the original questionnaires.

²⁷ The data for Strands 1 and 3 are not strictly comparable because the former relates to expenditure over a five year period, while the latter relates to a single year. Nevertheless broad comparisons between the two are in order.

²⁸ The median is used as a measure of "typical" rather than the mean, because the latter is unduly distorted for a number of the denominations in this instance by a few totally untypical results.

7.3.8 In order to make it possible to use this data to inform debate on the needs of places of worship, the six categories were chosen so as to match as closely as possible those used by the Heritage Lottery Fund and other funding agencies. The categories used were:

- “High Level Work” – including work to roofs, spires, towers, parapets, guttering, interior ceilings, rafters etc.
- “Fabric Work” – including work to walls, stonework, windows, flooring and other essential work.
- “Services” – including heating, plumbing, lighting and other electrical work.
- “Facilities” – including work to kitchens, toilets, access, sound systems, locks, security, health and safety and other work necessary to enable and improve public / community use of the church.
- “Organs / Bells” – self-explanatory.
- “Other / General” – all work not covered by the above categories, including surface decorating and other cosmetic work.

7.3.9 Because the *VAT & the Church Survey* had a specific remit which did not depend on the nature of the repairs (only their cost) it was not possible to make an exact match between these categories and those used by other funding bodies. Neither was it always possible to allocate repairs detailed in the original questionnaires to these categories with absolute precision and certainty; it is impossible to avoid a certain element of subjectivity in the process. Therefore the apparent emphasis on “Other / General” work may actually overstate the reality of the matter. Nevertheless, subject to these caveats, it is believed that the data in Tables 19 and 20 give a reasonably reliable indication of the nature, variety and balance of different categories of work undertaken by parish churches.

7.3.10 Altogether the sample of 230 churches reported total expenditure on repairs amounting to £3.171 million during the year. Table 19 shows the breakdown of this expenditure according to the categories detailed in para. 7.3.8 above. Over 100 of the churches

reported having carried out high level work, and almost as many reported having carried out necessary fabric repair work. These two categories together accounted for close to half the total expenditure recorded. Some 40% (two out of five) of the churches also reported having carried out work under the "Services" category.²⁹

7.3.11 Table 20 shows the distribution of repair costs according to grade of listing and two aggregated categories of work: (i) "High Level" + "Necessary Fabric" work, and (ii) "Services" + "Facilities" + Organs / Bells" + Other / General" work. Over half (52%) of the repairs to listed grades I, II*, A or B churches designated as "High Level or Necessary Fabric" work cost less than £1,000 while 85% cost under £10,000. The figures for similar work to Grades II or C churches were substantially the same (59% and 86% respectively).

7.3.12 Some 45% of the repairs to listed grades I, II*, A or B churches designated as "Services, Facilities - - - (etc)" work cost less than £1,000 while 82% cost under £10,000. The figures for similar work to Grades II or C churches were 50% and 83% respectively.

7.3.13 When assessing need from the standpoint of grant allocation, it is clearly necessary to distinguish between the two broad categories of repair work on the grounds of urgency and risk to the continued use of the building. However the marked similarities between the profiles of the two groups suggest that from the standpoint of the churches themselves there is little to distinguish one from the other with regard to the costs involved.

7.3.14 As a general observation from reviewing the *VAT & the Church* questionnaires in the context of this study, it is apparent that a significant proportion of repair work is not primarily motivated by the desire to undertake restoration work for its own sake, but has more to do with keeping the church useable, especially within a broader community context. Preserving the heritage fabric of a listed church is

²⁹ As already explained, the large proportion under the "Other / General" category is as much a reflection of the problems of allocation as of the diverse nature of the work carried out.

not necessarily the most pressing item of expenditure. Attending to the boiler, heating, lighting, wiring, kitchen, toilet etc frequently has a greater priority as far as the community is concerned.

7.4 Strand 4a

7.4.1 Strand 4a of this report analyses information received in response to the questionnaires sent to the 33 County Historic Churches Trusts in England.

7.4.2 Responses were received from 25 of the 33 County Trusts, representing a response rate of approximately 75%. On balance, responses to the initiative were positive. However the quality of the responses varied significantly, from those which gave relatively superficial answers in terms of the amount and usefulness of the information supplied, to those which supplied large quantities of information in meticulous detail.

7.4.3 Of the 25 responding trusts, 23 provided details of a total of 916 churches which they had supported during the period under review. The remaining two trusts indicated that they had supported a total of 70 churches (35 each) but were either unable or unwilling to supply any further details. Because as a rule Trusts normally tend to make one award for a specific programme of work during any given short period of time, it is in order to assume an equivalence between the number of churches grant-aided and the number of projects grant-aided.

7.4.4 Taking the 25 responding trusts together, they provided grant-aid to a total of 986 churches during the period – an average of 39 churches per trust. Assuming that this average is representative of the whole body of County Historic Churches Trusts, this implies that the Trusts as a whole assisted some 1,300 churches during the period. This is an impressive number in absolute terms, and demonstrates the vital role which the Trusts play in providing financial support for repairs to listed churches. However, it represents a very small percentage (less than 10%) of the total number of listed places of worship in the

country,³⁰ indicating the crucial need which exists for other funding sources also to provide much needed support.

7.4.5 The 916 churches for which details were given, provide the database from which the further findings of this Strand of the study are drawn. Table 21 shows the distribution of grant-aided churches by grade of listing. Taking all the County Trusts as a whole, approximately 50% were known to be listed grade I or II*; just 16% were grade II and 6% were unlisted.

7.4.6 Assuming that those churches for which the grades were not recorded, are distributed pro-rata among those for which the grades are known, this suggests that approximately 70% of the grant-aided churches are grade I or II*, 22% grade II and 8% unlisted. By comparison, it is estimated that only approximately 50% of all listed churches in England are grade I or II*.³¹

7.4.7 This suggests that the County Trusts tend to have a bias towards grant-aiding grade I / II* churches above those with lesser grades. This is only to be expected, since most of them have strictly limited budgets. Indeed, turning the figures around, it is perhaps surprising that as many as 40% of the churches supported were only listed grade II or even unlisted.

7.4.8 In fact there is considerable variation between Trusts with regard to the ratio of grade I / II* to grade II churches supported. Figures recorded by this survey vary from as much as almost 90% grades I or II* / 10% other, to as little as 22% grade I or II* / 78% other.

7.4.9 In 668 cases out of the 916 in the data set, the Trust was able to classify the nature of the work grant-aided according to the classification system commonly used in this context, namely:

³⁰ According to the National Monuments Record there are some 17,200 listed places of worship in England.

³¹ According to *The Heritage Monitor 2000* (English Tourism Council, 2000) the denominations of 11,200 of the 17,200 places of worship are known. Of these, 53% are listed grade I or II*.

- Urgent building repair work, essential to secure the continued use of the building as a place of worship, which meets the current Joint Scheme eligibility criteria;
- Urgent building repair work, essential to secure the continued use of the building as a place of worship, but which does not meet the current Joint Scheme eligibility criteria;
- Necessary maintenance work or minor structural repairs which are ineligible for Joint Scheme support.

7.4.10 Table 22 analyses the incidence of grant-aided work according to this classification system, for the two listed group categories (grades I or II* and II). It will be seen that for grade I or II* listed churches there is a reasonably equal balance between the numbers grant-aided to carry out the three different categories of work. However for grade II listed churches a very much smaller proportion (16.9%) were grant-aided to carry out work which would have been eligible for Joint Scheme support, with a correspondingly larger proportion grant-aided to carry out work which did not meet the eligibility criteria.

7.4.11 Where adequate descriptions of the work grant-aided were given (in 871 out of the 916 cases), the work was re-categorised according to the same categories used for analysing results in Strand 3 of the study ie. "High Level Work", "Fabric Work", "Services", "Facilities", "Organs / Bells" and "Other / General" (for a fuller explanation of these groups, and possible sources of error, see paras. 7.3.8 and 7.3.9 above). The results are shown in Table 23.

7.4.12 It will be seen from Table 23 that the work grant-aided is predominantly "high level" and "fabric" work for both grade I / II* and grade II churches.

7.4.13 Taking the results of Tables 22 and 23 together, it would appear that the County Trusts favour urgent high level and fabric repair work without regard to the grade of listing of the church, and with a willingness to disregard the Joint Scheme eligibility criteria when grant-aiding grade II churches.

7.4.14 The total amount of grant-aid in respect of the 916 cases amounted to approximately £2.2 million – equivalent to an average

(mean) grant of approximately £2,400. The median figure is £2,000 which suggests that the distribution of awards is not particularly skewed either one way or the other towards low or high individual amounts of grant-aid.

7.4.15 Details of the distribution of the individual grants are shown in Tables 24 to 26. Table 24 certainly supports the median figure quoted in para. 7.4.14 above; it shows that approximately 50% of individual grants overall were for £2,000 or less. However it also shows that a small but significant number of grants were made of amounts up to £12,000, with a very small number up to £20,000.

7.4.16 Table 24 also shows the strong bias towards lower value grants to grade II churches compared to grants to grade I or II* churches. Grants to grade I or II* churches (mean £2,700, median £2,000) tend to be significantly greater than grants to grade II churches (mean £2,000, median £1,300). Indeed the difference between the means of the two groups (£2,700 for grade I / II* churches and £2,000 for grade II churches is statistically significant.³²

X / 7.4.17 No single grant made by any of the County Trusts was for more than £20,000. Most of the Trusts acknowledge experiencing greater demand than they are able to fulfill, so putting a ceiling on grants is a logical means of spreading their available funds as widely as possibly. It was not possible to ascertain how the grant compared to the total cost of the work carried out.

7.4.18 Table 25 analyses the grants according to the classification of the work carried out. The distributions suggest that there might be a slight tendency towards lower grants for work which met the Joint Scheme eligibility criteria, than towards work which did not meet the criteria. In fact this is more apparent than real. The means are the same for both groups (£2,500) as are the medians (£2,000). Only the ineligible necessary maintenance work attracts lower grants (mean £2,100, median £1,000).

³²

t = 0.017, p = 0.000.

7.4.19 Table 26 analyses the grants according to the nature of the work carried out. It shows that grants for more than £6,000 are almost exclusively confined to "High Level" and "Fabric" work.

7.4.20 In fact, references to "meeting the Joint Scheme criteria of eligibility" are largely academic, because the fact remains that less than 3% by number of the 906 grants made to listed churches were for more than £10,000. Even allowing for the fact that the actual total cost of the work may have been significantly greater than the amount of the grant, it is doubtful whether more than a small minority of projects would have reached the Scheme's lower limit of £10,000 – and the figure would be even lower if reference was made to whether or not the churches were in the designated priority (Annex A) areas. In this respect, this data supports the evidence of other Strands of this research, in terms of the gulf which exists between those major projects which receive support from the Heritage Lottery Fund and the partner agencies, and the more modest needs of the majority of parish churches around the country.

7.4.21 The County Trusts were also asked to assess (in some instances subjectively) the urgency of the work which they grant-aided, in terms of it being either recommended within the next 2 years, or 2 - 5 years. Of the 916 grants made, 677 were assessed in this manner: 86% as being of "immediate" urgency (within 2 years) and 14% as being of medium-term urgency. A slightly higher proportion of work grant-aided on Grade I and II* churches was deemed to be of immediate urgency than was the case for grade II churches (87% compared to 82%) but otherwise there were no notable features. Again in view of the financial circumstances of most County Trusts, it is not surprising that they should concentrate their efforts on supporting work of immediate urgency. However this reinforces the need for a longer-term approach to funding repairs and maintenance work, as already discussed in para. 7.1.17 above.

7.4.22 The County Trusts do not always record details of the other sources of funding used by the churches to meet the cost of projects they themselves grant-aid. However 322 of the 916 cases analysed, included this information; the results are shown in Table 27. Note that the sources shown are the principal sources of other funding – the majority of work projects detailed, sought financial support from more than one other source.

7.4.23 It is significant that the principal other source of funding for grade II listed churches is effectively "self-help" – ie. local and congregational fundraising. Listed grade I and II* churches rely far less on local effort or their own resources, but are significantly better placed to seek assistance from parish and DBF funds and from English Heritage and / or the Heritage Lottery Fund.

7.4.24 As in the case of the evidence collected for Strand 1 of this study, many of the comments made by respondents to the Strand 4a survey reveal as much about the funding needs of churches, and the attitudes of other funding bodies towards the current structure of institutional funding support, as the hard data contained in the completed questionnaires. Many of the comments deal with the Trust's preferences with regard to full- or part-funding. A selection of these comments follows below (as before, comments in italics are as far as possible in the words of the respondents themselves):

- *"We cannot full-fund anything, as our maximum grant is generally £5,000. It depends on the shortfall. If other grant-aid is inadequate, [we] will give applications as much consideration as those which cannot attract other funding at all."*
- *"We are seldom in a position to offer "full funding" although any EH grant is obviously taken into account when assessing our own grant."*
- *"We know what other grants have been received or applied for, but not necessarily whether they have been successful. If there has been no answer to an EH appeal we would normally delay our own decision until the result was known".*
- *"Grants sometimes have to be offered before it is known who else is supporting the project; if everyone waits for everyone else, a much-needed project may never get off the ground."*
- *"Sometimes urgent work is held up until the completion of critical work for which funding cannot be found; for*

example, it is not possible to do urgent plastering work until completion of expensive re-wiring."

- *"Because of its limited resources, the Trust gives what it can where it can, irrespective of whether other funding bodies are involved."*
- *"The Trust never provides full funding. It does not discriminate, other than to reduce project costs by known HLF / Insurance income when assessing grant – information is used solely to calculate our own capping figure, which is a percentage of the net project cost."*
- *"The Trust receives a block grant from the Manifold Trust to use, at its discretion, to give to particularly worthy applicants which deserve more than the formula suggests is appropriate – it allows the Trust to give a "bonus" to selected cases without being inconsistent with its own grants."*
- *"The Trust only has an annual budget of £40k to spend on 28 churches. We aim to help all churches (and synagogues) in the county regardless of denomination for any structural repairs, internal fixtures, windows, heating, lighting etc. But we do not cover any non-technical work."*
- *"The Trust's approach is largely empirical. It makes grants, and occasionally loans, to any place of worship that is hard pressed and is carrying out worthwhile and sensible work."*
- *"Support from HLF / EH, or lack of other funding, is not a priority. Each case is considered on its merits, its need and its resources – our priority is simply to assist where needed."*
- *"Listing status is irrelevant; all applications are considered without priority."*
- *"Try to help those whose need is greatest, having regard to size of project in relation to population served. Level of listing is a secondary consideration. In practice, all EH-supported projects receive some help."*

- *"All applicants receive equal consideration regardless of other funding sources, although other funding influences the level of grant offered. The aim of the Trust is to fully support all historic churches and chapels to the best of its financial ability."*
- *"We expect churches to fundraise for themselves, but we always assist applicants. This encourages work to be put in hand soonest, to prevent further deterioration. If fundraising takes too long, it increases risk of disheartening caring people and jeopardising fabric."*
- *"All our grants are for essential repairs – [county] does not qualify for HLF money, and EH grants are scarce."*
- *"On balance, we prefer to help churches which have shown sufficient initiative to help themselves."*
- *"Trust tries to support as many applicants as possible, in a small way, although where a parish has a small electoral roll, or other difficulty, it tries to be a little more generous. In most cases, grant is offered before the applicants seeks grants from elsewhere. Joint Scheme eligibility is not often a factor."*
- *"The Trust looks at the urgency and extent of work, takes into account the ability of the parish to pay, looks at the funding gap, and makes a contribution relevant to these factors. JGS eligibility is not a factor."*
- *"The Trust is more interested in projects in relation to the population served; listing is a secondary consideration."*

7.4.25 The following three comments deserve special attention:

- *"The increasing Diocesan financial demand on parishes is beginning to restrict the funds and the willingness of parishes to commission fabric repairs. I do hope that the government understands that, unless there is a substantial increase in funding support, many of our churches will fall into disrepair."*

X /

- *"I do wish people would stop linking social deprivation with urban contexts. Rural deprivation is just as real, but often goes unseen. Parts of [the county] are EU recognised areas of deprivation and grants from the HLF when first introduced were extremely welcome. In many areas the church building is, if not the last, one of the few public buildings remaining in the village. The shop has closed, the post office has closed, the pub has closed, the school has closed, public transport is non-existent. The opportunity via the HLF to improve facilities within church buildings . . . returned churches to the status of social gathering places which . . . they were when originally constructed many centuries ago. With the rules of application changed, the total lack of funding from other sources for such improvements mean that these structures are used for a couple of hours a week and this situation will ultimately call into question their need and future. If the government is serious about regarding historic churches as "jewels in the crown" – many of which are ironically in rural areas – it should lift its urban biased restrictions on access to the HLF."*
- *"We are in an area of rural deprivation. Many churches in the county provide the only community facilities in shrinking villages with no other community halls. Unlike some other areas, we are not in a position to benefit from the Landfill Tax Credit Scheme."*

7.4.26 It is pertinent to the second and third of the above points, to note the comment in *The Heritage Monitor 2000* that: *"The distribution of listed Anglican churches is heavily biased towards sparsely populated parts of the country. 49% of the total and 61% of the grade I churches are located in . . . regions which contain only 26% of the population of England"*.

} *

7.4.27 It should also be noted that the assertion by a number of the County Trusts that they are even-handed with regard to listing grade in their grant-making policy, is at odds with the evidence as set out in Table 21, which shows a marked bias towards grade I and II* listed churches.

7.5 Strand 4b

7.5.1 Strand 4b of this report analyses information received in response to the questionnaires sent to a selection of grant-making trusts around the country.

7.5.2 Altogether questionnaires were sent to 52 trusts (see list in Appendix C). Replies were received from 32 of them, representing a response rate of a little over 60%. As in the case of the responses to other questionnaires in this study, the responses from the miscellaneous trusts varied considerably in terms of the quantity and quality of information they contained.

7.5.3 The database on which the findings relating to this Strand are principally based, comprises the responses from 13 of the trusts, which together provided details of a total of 172 grants worth £500,000 to churches during the period. Unfortunately, too little is known about the number and policies of other grant-making trusts, for it to be possible to "gross-up" this figure to provide an estimate of the funding capabilities of the whole population of such trusts.

7.5.4 A further four responses were from trusts whose activities were sufficiently special as to warrant special review, outside the scope of the main database. This material appears later in this Section.

7.5.5 A number of the remaining responses were from trusts which, while not supplying material suitable for inclusion in the database, nevertheless contributed comments which warrant inclusion in the "anecdotal" section of this review (see para. 7.5.13 below).

7.5.6 Table 28 shows the basic characteristics of the churches and projects grant-aided by the selection of trusts. Unfortunately in some respects, in the case of a number of the characteristics, the most common designation is "Unknown / not stated". However the absence of these characteristics may itself be an important feature. Thus for example, the listed grade of the church in question was recorded in only 25% of cases. One possible reason for this could well be that the grade of the church is not an absolutely critical issue when assessing applications for grants, and that a number of the trusts tend to apply eligibility criteria which depend on definitions of need in a far broader context than simply the architectural heritage merit of the church as

measured by its designated listing grade.³³ If this is indeed the case, it means that such trusts provide funding opportunities for churches which might not meet strict eligibility criteria based purely on architectural / heritage merit but are nevertheless worthy of support in a local community context.

7.5.7 Similarly, the classification of the work is recorded in only 6% of cases. The simple explanation of this is might well be that such distinctions are irrelevant outside the context of applications to the Heritage Lottery Fund, English Heritage and the other principal funding agencies.

7.5.8 Although as many of 68% of the cases do not record the priority of the work grant-aided, it is probably significant that the large majority of those which do, assess the priority as being "necessary within the next 2 years". This attitude towards applications for grant-aid has been noted elsewhere in this study. Limiting grants to urgent cases is an understandable and relatively straightforward means of rationing finite resources, but it may well mean turning a blind eye to modest maintenance projects now, which could prevent the need for far more extensive work being necessary over the medium to longer term.

7.5.9 The analysis by nature of the work shows that the largest number of the grants (41% by number, 25% by value³⁴) go towards urgent necessary fabric repairs. This is consistent with the approach outlined in para. 7.5.8 above, although it does appear to be at odds with the sentiment expressed in para. 7.5.7.

7.5.10 Because relatively few cases record the listed grade of the church in question, it is unlikely that any discriminant analysis based on this characteristic would be statistically robust. Therefore Table 29 shows the distribution of grants for all cases together, irrespective of listed grade. Although the distribution of grants shows the typical pattern of a high concentration at lower values, there are more grants at

³³ It is also possible that the lack of detail could be due to the (perfectly understandable) unwillingness or inability of some Trusts to take the time necessary to complete the questionnaire fully.

³⁴ Excluding one grant of £100,000 for bell restoration, which would otherwise completely distort the findings.

higher values than in the case of the grants made by the County Historic Churches Trusts (Strand 4a, para 7.4.15 and Table 24). Some 27% of grants awarded by the miscellaneous trusts were for sums in excess of £5,000 compared to just 15% of grants awarded by the County Trusts.

7.5.11 General trusts are more ready to award small sums, as well as large sums. The mean and median grant values for the general trusts were £3,100 and £700 respectively, compared to £2,400 and £2,000 for the County Trusts; the maximum grant awarded by a County Trust was £20,000, while a number of those awarded by the general trusts were well in excess of this sum.

7.5.12 Table 30 shows the distribution of grants awarded by the general trusts according to the nature of the work carried out. It shows that in fact none of the grants in excess of £10,000 went to high level repairs, and only one to fabric repairs. This adds to the impression of the general trusts as being perhaps more ready than the County Trusts to support work which has less to do with structure and more to do with services and facilities ie. for community use.

7.5.13 As in previous Strands, the general observations made by the respondents are often particularly revealing, for example:

- *"The Trustees make their own judgment, and fund PCCs which set their own spending priorities."*
- From a trust with a geographical remit: *"Our clear and consistent policy is to support any appeal from any church in [county]"*.
- *"We award grants for church community projects as well as for restoration of church buildings."*
- *"The trust is not simply interested in church buildings themselves. Trustees place great emphasis on the level of community support, and the part the church plays in the social and spiritual life of a village."*
- *"The trust is happy to part-fund projects, but does like to be able to identify their specific part of any larger project."*

- *"We are ready to give to any worthwhile church with which the family Trust has a connection."*
- *"Trust will fund projects which are supported by HLF / EH. However it is also willing to fund work which may not attract funding from other sources where the need is known."*
- *"Trust is less concerned about architectural merits of buildings, and more concerned with their use as places of worship and community resources."*
- *"Trust no longer makes direct grants. It gives block grants to the CCC and HCPT for those bodies to distribute on the Trust's behalf, at their discretion".*
- *"One of the Foundation's objectives is the conservation and improvement of the environment, which is deemed to include [repairs to] churches and other places of worship."*
- *"The Trust is pro-active. We take the initiative and approach diocesan representatives, asking for lists of deserving churches, which we then approach and invite them to apply for grants. We limit our activities to a few selected counties each year, gradually working our way around the country. It is the most effective way of keeping down our administrative costs".*

7.5.14 A number of the above comments clearly point to the difference in priorities between the County Historic Churches Trusts which tend to be principally concerned with the churches in terms of their architectural heritage merit, and the general trusts and foundations which tend to take a broader view in terms of the use of church buildings as community resources.

7.5.15 The following paragraphs review the funding activities of the trusts which were mentioned in para. 7.5.4 as deserving particular attention.

7.5.16 **Allchurches Trust Ltd.** In general terms, the Trust makes charitable grants to the Church and the Christian community, out of income derived from the Ecclesiastical Insurance Office plc which it owns. There are no geographical restrictions. Grants to individual

churches³⁵ in calendar 1999 amounted to £73,200 out of a total grant allocation of £4.0 million. The largest single grant was for £5,000. There were 9 grants, totalling £16,500, for £1,000 and over, and 365 grants, totalling £56,700, for less than £1,000.

7.5.17 Historic Churches Preservation Trust and Incorporated Church Building Society. The HCPT is a national, non-denominational registered charity, whose purpose is to help finance church repairs in England and Wales.³⁶ Since 1983 the HCPT has assumed responsibility for the administration of the affairs of the ICBS (the Society for Promoting the Enlargement, Building and Repair of Anglican Churches in England and Wales). The Trust's limited resources mean that it must confine its awards to fabric repairs only.

7.5.18 During the 27 months to 31 December 2000³⁷ the HCPT and ICBS together awarded some 800 regular³⁸ grants totalling £2.7 million,³⁹ with a mean value of £3,400 and a median value of £2,600. The maximum grant is normally £7,500 although a very small number of grants of £10,000 have been made from one of the Trust's particular Fund. The distribution of the grants by value is shown in Table 31. Although there is a large concentration of grants at the lower end of the value scale, the distribution is principally notable for highlighting the significant proportion of grants close to or at the maximum limit.

7.5.19 Council for the Care of Churches. The Council for the Care of Churches grant-aided some 244 listed churches during calendar year 2000. The majority are to grade I / II* Anglican churches, but grants are

³⁵ Not including grants to cathedrals, which constitute a separate category.

³⁶ A small number of grants are also awarded to churches in Northern Ireland.

³⁷ The 15 months to 31 December 1999 plus the 12 months to 31 December 2000.

³⁸ Not including a number of large (between £30,000 and £100,000) special Millennium Fund Grants awarded in 2000 to churches judged to be in especially great need. The figures also exclude *loans* made during the same period.

³⁹ Including the contribution from the Manifold Trust, which is subsequently recovered.

also made to grade II listed churches, to other denominations and to churches in Scotland and Wales. Details of the grants are shown in Table 32.

7.6 Strand 5

7.6.1 As explained in para. 5.6.4 this Strand brings together relevant ad-hoc material from a number of sources.

7.6.2 **The Church of England.** In addition to its annual *Church Statistics* publication⁴⁰, the Church of England's Research and Statistics Department's analysis of the 1999 Finance Returns, completed in Summer 2001, shows total⁴¹ expenditure of £16.154 million on routine maintenance during 1999 together with £126.644 million on major church repairs and other capital work. Fuller details are shown in Table 33.

7.6.3 **Historic Scotland.** The Grants Unit of Historic Scotland provided details of 66 grants totaling £4.990 million made to places of worship in Scotland during the two 12-month periods 1998/99 and 1999/00. In almost every case the grants were matched by funds raised from "private" sources, usually from within the congregation or community. Details of denominations and listing grades were not available, but further information is shown in Table 34.

7.6.4 **The Church in Wales.** For the purposes of this survey, the Representative Body of the Church in Wales undertook a special analysis of Fabric Repair Grants made during the period under review.

7.6.5 During the 24 month period from September 1999 to September 2001 the Fabric Repair Fund awarded grants to 22 Grade I / II* churches, 18 grade II churches and 15 grade A / B / C churches⁴²

⁴⁰ Latest Edition *Church Statistics 1999*, The Archbishops' Council, 2001.

⁴¹ Aggregated over 43 dioceses (excludes the Diocese of Europe). Figures include unlisted as well as listed churches.

⁴² The grades stated are those shown on the summary application sheet prepared at the time of the application for the grant. Cadw are currently re-surveying

(the Fund also made grants to 16 unlisted churches, which are beyond the scope of this study). "Funding priority" and "classification", as understood by this study, were not recorded on the application forms. However it is clear from the details given that virtually all of the grants were awarded towards major repair projects, which most applicants would have assessed as being urgent, with high priority.

7.6.6 Fabric Repair Grants by the Fund to listed churches totaled £84,000 – an overall average of £1,527. Further details are shown in Table 35. Awards were for a small number of discrete amounts only; these are shown individually, rather than the more usual ranges of values.

7.6.7 Awards to grade I / II* (and equivalent) churches averaged £1,429 with a median figure of £1,000. Awards to grade II (and equivalent) churches averaged £1,700 with a median figure of £1,500. Awards tended to the low end of the value range; approximately 54% of grants to grade I / II* churches and 25% of grants to grade II churches were for £1,000 or less. By contrast, only 14% of grants to grade I / II* churches and 15% of grants to grade II churches were for £2,500 or more.

7.6.8 Possibly as a result of genuine initiative or need,⁴³ virtually all the churches grant-aided by the Fabric Repair Fund had also made numerous other applications to other funding sources to assist in meeting the cost of the work. Many showed considerable inventiveness in their choice of funds to approach for grants, but a number of names appeared with particular frequency. Of the 55 cases analysed for this survey, 20 had approached the Diocesan Churches & Pastoral Committee for additional support and 16 had applied under the Welsh Church Acts Fund.⁴⁴ Among private charitable trusts and foundations,

in Wales and many of the A / B / C grades shown may well have been updated subsequently.

⁴³ Or possibly simply as a result of more conscientious recording by the person compiling the return.

⁴⁴ The Funds derive from the disestablishment of the Church of England in Wales and are administered for general charitable purposes by each of the 22 unitary authorities. Grants can be available for the repair and restoration of historic religious and secular buildings, especially when in community use.

two stand out in particular: the W G Roberts Trust (8 applications) and the James Pantyfedwen Foundation (7 applications).

7.6.9 Jewish Places of Worship. There are believed to be only 31 listed buildings in the UK currently in use as Jewish places of worship, together with a further 7 listed cemeteries.⁴⁵ One of the synagogues is listed grade I, 13 are grade II* and 17 are grade II. Seven are in London, 21 elsewhere in England, 3 in Scotland and none in Wales or Ireland. It is understood⁴⁶ that four of the synagogues and one cemetery have made successful bids for grant-aid in recent years to the Heritage Lottery Fund and / or English Heritage or Historic Scotland. It is further understood that two synagogues (both listed grade II*) have made unsuccessful bids for grant-aid during the same period.

7.6.10 Given the small numbers involved, formal statistics are not particularly meaningful. However some of the correspondence received gives some interesting insights into the matter:

- From the senior partner of a firm of chartered surveyors, appointed by the United Synagogue to handle all works of renovation, improvement etc.: *"The [synagogue] was listed grade II in the 1970s. Unfortunately the contribution towards repairs at that level is limited to £1,000. However in the mid-1990s I succeeded in upgrading the listing to grade II*. This was immensely helpful to us because there was substantial deterioration in the fabric of the synagogue, which needed urgent renovation."*

"English Heritage proved extremely helpful and very sympathetic to our needs. . . . They helped us not only by providing half the cost of the repairs, but also introduced us to specialist craftsmen. In short, we could not have wished for better co-operation . . . and I wrote to Sir Jocelyn Stevens to express my gratitude for the way his organisation had handled the matter."

⁴⁵ Source: *Jewish Yearbook*, quoting data compiled by the Working Party on Jewish Monuments in the UK and Ireland and the Survey of the Jewish Built Heritage.

⁴⁶ Source: Survey of the Jewish Built Heritage.

"The total cost of the repairs was about £350,000 plus fees, although we spent a further £150,000 on improvements, for which, of course, English Heritage do not pay."

The residual 50% of the repair work, and the improvements were paid for partly by the generosity of certain members and also trusts, and the balance was by way of a loan from the United Synagogue, which is now virtually repaid."

"The question of anticipated essential repair work is a difficult one to answer because the building is always in constant need of repair and improvements, but the cost of these works is mostly funded by members. For example, the carpet in the main synagogue is threadbare in many places, and is in urgent need of replacement; that will cost £15,000. A hall and staircases all need to be refurbished, which will cost another £10,000. So I fear that the list can never be finite."

"The main problem with the [synagogue] is that superficially it looks quite beautiful, but it was built in 1878 when construction was fairly unsophisticated – for example, we had no damp course in the building – so things are always likely to go wrong. Moreover, I fear that previous managements of the synagogue spent virtually no money on the structure, hence deterioration became compounded and very costly when we could wait no longer."

7.6.11 The final sentence in the above comment is a further acknowledgement of the importance and ultimate cost-effectiveness of timely intervention before minor problems become major ones.

7.6.12 **Landfill Tax Credit Scheme.** A number of churches have also been successful in the past in attracting quite substantial amounts of funding through the Landfill Tax Credit Scheme,⁴⁷ although recent

⁴⁷ Eligible applicants must usually be within a 10 mile radius of a licensed landfill site, and approved environmental projects include "the maintenance, repair or restoration of places of religious worship . . .".

indications from the government indicate that the Scheme may provide fewer such opportunities in the near future.⁴⁸

7.6.13 The Scheme covers the whole of the UK and potentially about £120m is available for environmental projects each year. Places of worship are included in "Object e", which allows "the maintenance, repair or restoration of a building or other structure which is a place of religious worship or of historic or architectural interest". Support is not restricted to listed buildings.

7.6.14 Altogether, from the time the Scheme was introduced in 1996 up to the present time,⁴⁹ approximately 270 projects have been approved under "Object e", of which some 200+ relate to churches. Final costings are available for some 150 of these projects, the total project cost of which amounted to £1.932 million.

7.6.15 The mean project cost was £12,500 and the median figure was £5,000. The distribution of the costs is shown in Table 36; although almost half were under £5,000, a sizeable proportion (almost 30%) exceeded £10,000.

7.6.16 At least three County Historic Churches Trusts and one denominational trust figured prominently among the environmental bodies ("EBs")⁵⁰ applying for grants, as did a number of individual church trusts and parish councils.



⁴⁸ The 2001 Budget stated the Government's intention to challenge the waste industry to allocate a greater proportion of tax credit towards sustainable waste management projects. In the longer term, the Government wants to replace all or part of the LTCS with a public spending programme to direct resources towards Government priorities on sustainable waste management. However, for the time being at least, the programme continues to offer opportunities to places of worship.

⁴⁹ August 2001.

⁵⁰ EBs must be non-profit making, but they do not have to be a charity. They can be a trust, partnership or other unincorporated body.

8. Assessing Global Needs

8.1 Updating the *Churches Needs Survey*

8.1.1 The most appropriate starting point for a "global"⁵¹ assessment of church needs at the present time, is the data yielded by the earlier *Churches Needs Survey*. The estimated annual cost of major repairs to Church of England churches according to this survey may be summarized as follows:

(All figures in £ millions)

	Grade I / II*	Grade II	All Listed	Unlisted	All Churches
Basic cost at '94 prices	38	20	58	22	80
Plus fees	4	2	6	2	8
Plus VAT	7	4	11	4	15
Total at '94 prices	49	26	75	28	103
Total at '98 prices	59	31	90	34	124

8.1.2 It is not to be expected that the standard measures of inflation in costs for the building sector as a whole will necessarily apply to listed churches, given the highly specialized nature of much of the repair work involved. The *Churches Needs Survey* calculated estimated figures for 1998 by assuming a 20% inflation in costs over the period from 1994. In the absence of sound empirical evidence to the contrary, it would probably be in order to assume a further increase of the same order between 1998 and the present time. This suggests the following estimates for present-day costs:

(All figures in £ millions)

	Grade I / II*	Grade II	All Listed	Unlisted	All Churches
Basic cost	55	29	84	31	115
Plus fees	5	3	9	3	12
Plus VAT	11	6	16	6	22
Total at current prices	71	38	109	40	149

⁵¹

ie. relating to all places of worship across the whole country.

8.1.3 On the basis of just these figures, this would suggest an annual requirement at the present time for C of E churches of £71 million for grade I / II* churches plus £38 million for grade II churches, making £109 million in total. These estimates include fees and VAT at the current rate ie. they make no allowance for the possible impact of the recently announced⁵² reduction in VAT to 5% on repairs to listed buildings used as places of worship.

8.1.4 It should also be noted that the above figures for present-day annual needs are the result of two extrapolations from the original *Churches Needs Survey* data (from 1994 to 1998 and from 1998 to the present time) amounting altogether to some 45%⁵³ of the basic figures, which were themselves no more than best estimates. The figures should therefore be treated with a considerable degree of caution, and accorded correspondingly large margins of error.

8.2 Reconciliations

8.3.1 Table 14 of this report shows a figure of £15,297 for the average (mean) expenditure on repairs to grade I / II* listed C of E churches and a corresponding figure of £17,443 for grade II churches, based on the 2000 *VAT & the Church Survey*. The figures relate to calendar 1999 and, like the *Churches Needs Survey* data, also include VAT and fees. Assuming cost inflation of somewhere between 10% and 15% between 1999 and 2001, this would imply average costs of approximately £17,200 and £19,600 per church at the present time for the two respective categories of listing.

8.3.2 *The VAT & the Church Survey* data encountered some difficulties with regard to estimating the total number of listed Church of England churches. According to *Heritage Monitor 2000*, at the latest reckoning there were estimated to be some 17,000+ listed places of worship in England, of which the denominations were established reliably in 11,210 cases. Of this total number, some 7,540 were

⁵² Budget 2001.

⁵³ i.e. (1.2 x 1.2).



Anglican churches, of which 39% were grade I, 35% were grade II* and 26% were grade II.

8.3.3 It is known from another source⁵⁴ that there are approximately 16,200 Church of England churches. Although the numbers of listed and unlisted churches within this total figure are not recorded separately, it is generally reckoned by the Church of England authorities that the total number of listed churches amounts to approximately 13,000. If it is assumed that the proportions of different listing grades which apply to the 7,540 churches can also be applied to the larger figure of 13,000 this gives estimates of approximately 5,100 grade I, 4,500 grade II* and 3,400 grade II church of England churches.⁵⁵

8.3 Global Estimates of Need

8.3.1 **England.** It should be noted that the average figures quoted in Table 14 of this report are based on those churches which actually carried out relevant repair work during the year, and ignore those churches which did not carry out any such work ie. those which made a "nil" return. The *VAT & the Church Survey* ultimately based its mid-range⁵⁶ estimates on the assumption that approximately 55%⁵⁷ of all

⁵⁴ *Church Statistics 1999.*



⁵⁵ The problem arises, in that according to the same source, the 13,000 listed churches are generally reckoned to include only 3,000+ grade I churches. This compares to the figure of 5,100 estimated above. The difference between the two figures remains unresolved at the present time.

⁵⁶ "Mid-range" in this context does not mean the central figure to which the margins of error are applied (ie. mean \pm margin %). The *VAT & the Church Survey* calculated low end and high end estimates of costs, according to two different more or less conservative sets of assumptions. The term "mid-range" in the context of this survey was used to designate the figure mid-way between the low and high figures calculated according to the two sets of assumptions.

⁵⁷ The low end estimate (used for all denominations) is based on the assumption that churches carry out repair work on average once in every three to five years ie. a factor of $\frac{1}{2} \times (1/3 + 1/5) = 0.267$ is applied to the figure derived from churches actually carrying out work. The high end estimate is based on the observed frequency of carrying out repairs and is calculated separately for each denomination.

Church of England listed churches overall had carried out work during the year (figures were not calculated separately for different grades of listing).

8.3.2 Multiplying the estimated numbers of listed churches (para. 8.2.3) by the appropriate estimated average expenditures recorded in Table 14, and scaling the results down by the proportion of churches actually carrying out such work, yields a figure for total expenditure of £81 million for grade I / II* churches and £32 million for grade II churches - £113 million overall. The *VAT & the Church Report* recommended that these figures should be stated within an overall margin of error of 25% (ie. $\pm 12\frac{1}{2}\%$).

8.3.3 Looking at these two sets of data, it will be seen that the latest needs assessment figures (derived from the earlier *VAT & the Church Survey*) yield results which are approximately 14% higher for grade I / II* churches than the data from the *Churches Needs Survey* updated to current prices⁵⁸ and 16% lower for grade II churches.⁵⁹ The totals (£113 million and £109 million respectively) are within 4% of each other.

8.3.4 Given the very different approaches adopted by the two surveys, these figures are reassuringly close to each other, especially considering that the *Churches Needs Survey* data figures relate to assessed anticipated needs rather than to actual expenditure, whereas the estimates derived from the *VAT & the Church* survey data figures relate to work actually carried out.

8.3.5 A further point of comparison is provided by the figures supplied by the Church of England's Research and Statistics Department (see para. 7.6.2 above) as shown in Table 33. This shows a figure of approximately £86.252 million expenditure on repairs in 1999.⁶⁰

In the case of Church of England the factor is approximately 0.840. The "mid-range" estimate can therefore be calculated by applying a factor of $\frac{1}{2} \times (0.267 + 0.840) = 0.55$.

⁵⁸ £81 million compared to £71 million.

⁵⁹ £32 million compared to £38 million.

⁶⁰ As far as is known, this figure also includes fees and VAT.

This figure covers repairs to all C of E churches, unlisted as well as listed. Assuming that 80% of the C of E's churches are listed⁶¹ and further assuming that the average expenditure per church was the same regardless of listed status, this indicates estimated annual expenditure on repairs by listed churches in 1999 (the year to which the figures relate) in the region of £70 million. The figure would probably be closer to £80 million at current prices. This is slightly lower than either of the other two estimates, but still within the same order of magnitude.

8.3.6 In seeking one single estimate of "global" annual requirement at the present time, it might be safest in the circumstances to work on the basis of the average of those yielded by the three different sets of figures reviewed above. With one set of data (*Churches Needs Survey* updated) suggesting £71 million for grade I / II* and £38 million for grade II, another set (*VAT & the Church* survey) suggesting £81 million for grade I / II* and £32 million for grade II and a third source (C of E Research and Statistics Dept.) suggesting a total of £80 million (no breakdown by grade) this suggests a mid-range estimate of total requirement of approximately £69 million for grade I / II* listed churches plus £31 million for grade II churches – making a total of £100 million for all listed churches. These figures differ only very slightly from the corresponding figures of £71 million, £38 million and £109 million respectively based on the *Churches Needs* figures updated to current prices.

8.3.7 Moving from England to Scotland, Wales and Northern Ireland, the evidence such as it is, is considerably less robust.

8.3.8 **Scotland.** It is estimated⁶² that approximately 75% of the Church of Scotland's 1,600 churches are listed. This estimate did not break down the total according to different grades of listing, and no information was available about numbers of listed places of worship of other denominations.

⁶¹ ie. 13,000 out of a total of 16,200 (see para. 8.2.3 above).

⁶² According to the governing body of the Church in Scotland, in consultation with Historic Scotland.

8.3.9 Unfortunately there is a wide gap between the average expenditure of grade A / B churches (£23,400) and Grade C churches (£7,900) as shown in Table 14. Referring to the median figures, it is likely that the average for grade A / B churches has been distorted by a small number of unrepresentative extremely high figures. In the circumstances, for the purposes of grossing-up, it would be prudent to take as a basis a figure slightly larger than the average for the grade C churches (say £8,000) and apply this to 1,200⁶³ churches, then make allowance for the proportion of churches carrying out work in any given year.⁶⁴ This calculation yields an estimated overall total requirement of the order of £5.8 million for all listed grades together (with a margin of error of at least $\pm 12\frac{1}{2}\%$).

8.3.10 **Wales.** The data for the Church in Wales is insufficiently robust or detailed for any reliable estimates of global requirement to be made. The *VAT & the Churches* survey assessed total annual expenditure on repairs by all (approximately 1,500) churches to be in the region of £12.4 million. However it was not determined how much of this total related to listed churches.

8.3.11 The special analysis of recent Fabric Repair Fund grants undertaken by the Representative Body of the Church in Wales yields estimated mean grant aid of approximately £1,430 per church for grade I / II* (and equivalent) churches and £1,700 per church for grade II (and equivalent) churches. However the figures are based on an insufficient sample (71 churches – see para. 7.6.5 - out of a total of 1,500) to provide a robust base from which to gross-up the results. Further, in order to gross-up the results in order to provide a global estimate of need, considerable further information is needed:

- Average total repair costs per church, not just the Fabric Fund grant element;
- The numbers of listed churches, by grade of listing, within the total number of churches;

⁶³ i.e 75% of 1,600.

⁶⁴ The low end factor is 0.267 and the high end factor is 0.93, yielding a mid-range factor of 0.60.

- The average frequency with which repairs are undertaken.

8.3.12 It was not possible to provide this information within the timescale of this study. Therefore no further estimates of global need could be calculated to compare against the figures set out in para. 8.2.13 above.

8.3.13 **Northern Ireland.** It was estimated⁶⁵ for the *VAT & the Church* Survey that somewhere in the region of approximately 25% of the Presbyterian Church in Ireland's 475 (or thereabouts) churches were listed (individual grades not known).

8.3.14 As in the case of the Church of Scotland, there is a wide gap between the average expenditure of grade I / II* churches (£18,600) and Grade II churches (£10,500) as shown in Table 14. Here however, the median figures suggest that the averages could be valid.

8.3.15 As the numbers of listed churches are not known for individual grades of listing, it is therefore appropriate to assume an overall expenditure mid-way between the figures for the two categories (say £14,500) and apply this to 120⁶⁶ churches. In this instance, the factor used to make allowance for the proportion of churches carrying out work in any given year is 0.57.⁶⁷

8.3.16 These assumptions yield an estimate for the overall total requirement of the order of £1.0 million for all listed grades together (with a margin of error of say $\pm 12\frac{1}{2}\%$).



⁶⁵ In conversation with the Convenor of the Commission on Church Architecture and the Listing Department of the Department of the Environment in Northern Ireland.

⁶⁶ i.e. 25% of 475.

⁶⁷ The low end factor is 0.267 and the high end factor is 0.87, yielding a mid-range factor of 0.60.

9. Summary of Findings

9.1 General Findings

9.1.1 At the present time, the needs of listed places of worship for financial assistance with regard to repairs and maintenance are being met by a mixture of: own existing funds; fundraising within the congregation / community; grant-aid from English Heritage / Historic Scotland / Cadw and from the Heritage Lottery Fund; grants from the County Historic Churches Trust and from the Historic Churches Preservation Trust; grants from the Council for the Care of Churches; grants from numerous private trusts and foundations that include such work within their objectives; support from dioceses; grants from local authorities / district councils etc; and many more *ad-hoc* sources.

9.1.2 By and large, the mix of funding opportunities appears to be working reasonably well. However there are a number of issues which it might be as well to keep under review at the present time. The principal of these are outlined in the paragraphs below.

9.1.3 **Priority Areas.** There is no argument with the need for some system of rationing to allocate finite grant resources, but there is considerable "grass roots" discontent at the manner in which Priority Areas have been designated as a means of achieving the desired result. The concern is that the Priority Areas almost exclusively represent areas of urban deprivation, and effectively fail to recognise the concept of rural deprivation. This seems at odds with the Joint Scheme's stated objective (Criterion 4) regarding wider community benefit. It is also difficult to reconcile with the fact that a disproportionate number of grade I and II* listed churches are in rural (frequently deprived) areas.

9.1.4 **Size of Grant-Aided Projects.** In terms of the size of projects (as measured by the cost) the profile of "typical" projects grant-aided by the Heritage Lottery Fund in conjunction with English Heritage, Historic Scotland or Cadw is significantly different from that of the projects undertaken by the large number of places of worship without the benefit of such grants. It seems quite proper to ration finite agency grant resources by reserving them for the finest "jewels in the crown". However when assessing the needs of listed places of worship as a whole, it is important not to lose sight of the very large proportion of

churches undertaking work at the lowest end of the spectrum which, even so, is beyond their immediate financial resources.

9.1.5 Reviewing the evidence in general terms, it is apparent that low-cost repair projects generally fare well because the bulk of the cost of the work is readily met by grants from trusts, foundations and other sources. Equally, the more expensive repair projects are frequently able to apply for grant-aid from English Heritage. The projects that frequently have most difficulty in financing the work are those that fall in the middle range in terms of the costs involved. On the one hand they are too large to benefit proportionately well from the smaller grant-making trusts, and on the other hand they are often too small to warrant attention from the larger grant-making agencies.

9.1.6 **Timely Intervention.** Inevitably with old buildings in daily use, even with regular Quinquennial Inspection Reports, unexpected repairs will frequently play havoc with the most carefully planned work programmes. There is a strong body of evidence to suggest that this is indeed happening, and that this is resulting in the deferral of planned urgent repairs. Even with no intervening events to throw their budgets off track, many churches nonetheless find it difficult to meet the cost of repairs agreed as part of a 5-year rolling programme.

9.1.7 One unfortunate consequence is that in spite of having the benefit (in theory) of a QIR, many churches have no choice but to continue to attend to repairs on the basis of immediate necessity; the idea that a timely repair now can prevent a more costly repair in a few years time is fine in theory, but is not always something which a church can implement in practice.

9.1.8 **Matched Funding.** This is becoming an increasingly difficult area. Many congregations are facing "donation fatigue". The problem is especially bad in rural areas with dwindling (and ageing) populations and declining economic activity. It is likely to become worse as diocesan finances come under increasing pressure for a variety of reasons, as is happening at present (see the comment in para. 7.4.25).

9.1.9 **Repairs vs. Maintenance.** It tends to be easier to attract grants for high profile repair work than for routine maintenance work, yet the fact remains that a significant proportion of the work necessary to

keep a church in sound condition and open for community use, comes under the heading of "maintenance" rather than "repair".

9.2 Non-Christian Places of Worship

9.2.1 In spite of attempts to fulfill the remit of this study in terms of reviewing the needs of non-Christian places of worship, in the event it very little information was gathered on this front. No data was received for either Moslem or Islamic places of worship, and only limited information regarding Jewish synagogues.

9.2.2 There is no reason to suppose that the funding needs of listed non-Christian places of worship are similar to those of Christian places of worship. Equally, there is no reason to suppose that the relatively positive experience of the one Jewish synagogue from which information was received, is even typical of the movement as a whole, let alone other non-Christian denominations. However the small absolute numbers involved suggest that although the matter cannot be completely ignored, it is unlikely to be a major issue in terms of the HLF's forthcoming overall review of the situation.

9.3 Scotland, Wales and N. Ireland

9.3.1 Again, although the remit of the study specifically included these countries, in practice the relevant bodies proved less able to supply the information requested within the timescale of the study (see para. 5.6.3 above).

9.3.2 For the most part, the information for these countries is that derived from the re-analysis of the data collected by the *VAT and the Church* Survey for the responding denominations from these areas. For Scotland, this data is supplemented by some limited data from Historic Scotland; for Wales, by a special analysis undertaken on behalf of the Representative Body of the Church in Wales.

9.3.3 The relevant *VAT and the Church* Survey data is shown in Tables 14, 15 and 17. In terms of the numbers of churches on which the data is based, the results for the Church of Scotland and the Irish

Council of Churches, are reasonably robust; the results for the Church in Wales, less so.

9.3.4 With regard to annual repair costs, there is little to distinguish the needs of Christian places of worship in Scotland and N. Ireland from those in England, although the data indicates that the former incur significantly higher annual ongoing maintenance charges. The data for Wales suggests significantly higher levels of outlay, although the results are statistically unreliable owing to the small number of cases on which the results are based.

9.3.5 Table 34 shows the distribution of grants from Historic Scotland. The figures need to be compared against similar statistics from English Heritage and Cadw, but on the surface they suggest that churches in Scotland receive relatively high levels of grant-aid.



10. The Impact of VAT and other Factors

10.1 Reduced Rate of VAT

10.1.1 In theory, the reduction in VAT on repairs to listed places of worship from 17.5% to 5% announced in the 2001 Budget should result in a corresponding reduction in repair costs. However it is unlikely that churches will feel anything like the full benefit of this reduction in practice because:

- (i) typically, much small scale repair work is carried out by contractors who are not registered for VAT in the first place; and
- (ii) it may be expected that a number of those contractors who are registered, will take the opportunity of increasing their underlying charges.

10.1.2 Full details of how the plan is to be implemented have yet to be announced. However, it should be noted that the stated intention is that VAT should continue to be charged at the full standard rate as the work is carried out, with eligible bodies then being allowed to claim a refund down to the reduced rate where appropriate.

10.1.3 As yet there are no indications of the time it is likely to take to receive the due refund of VAT. However if grants were reduced to reflect the reduced rate of VAT at the outset, this would result in serious cash flow problems until the application for a refund was processed and the refund was eventually received by the church carrying out the repair work. On balance, it would therefore be problematic to reduce grant-aid on account of any potential theoretical saving in VAT.

10.2 Diocesan Contributions

10.2.1 While the potential benefits which might be gained from a reduction in VAT are still a matter for conjecture, there is a more real and present threat to the financing of church repairs which actually points to the need for an increase in grant-aid. The present state of diocesan finance is beginning to cause real immediate concern in some parishes,

to the extent that a number of respondents to the questionnaires raised the point that diocesan support for repair schemes was likely to come under increasing pressure in the future. This may well mean that churches will have to look elsewhere for support for their building repair work in the future.



Letter and Questionnaire used in re-visiting the *Churches Needs Survey*

JEREMY ECKSTEIN ASSOCIATES
CULTURAL & HERITAGE SECTOR RESEARCH

«Treasurer»
«Address_Line_1»
«Address_Line_2»
«Address_Line_3»
«Address_Line_4»
«Post_Code»

29 June 2001

Dear «Salutation»,

Joint Grant Scheme for Churches and other Places of Worship

I have been asked by the Heritage Lottery Fund and English Heritage to carry out an assessment of the needs of listed places of worship in use, within the context of their *Joint Grant Scheme*. As part of this assessment I am reviewing the material gathered by the *Churches Needs Survey* during the early 1990s, and I am writing to you now as Treasurer of «Name of Church», «Town» because your church was one of those surveyed by that work.

The *Churches Needs Survey* assessed the likely repair needs of individual churches during the period 1995 – 2000 and categorised major items according to whether they were deemed to be: (i) Urgent (needing to be done within 2 years); (ii) Medium Term (2 – 5 years); or (iii) Deferrable (after 5 years). I am enclosing a copy of the report relating to your church: I would be grateful if you would please take a few moments to review it and then answer the short questionnaire which follows this letter.

In order to allow me to meet the timetable for the overall HLF review of which this is a part, I would be grateful if you would please return your completed questionnaire direct to me at your earliest convenience, but in any event so that it reaches me no later than **Friday 20 July**. I am enclosing a stamped addressed envelope for this purpose. If you have any specific questions about the questions, please call me at any time.

Alternatively, if you would like to discuss any other aspect of the study, please call either Judith Cligman at the HLF (on 020 7591 6126), Richard Halsey at English Heritage (01223 582700) or Thomas Cocke at the Council for the Care of Churches (020 7898 1882).

7 Chandos Avenue, Whetstone, London N20 9ED

Tel: + 44 (0)20 8445 4334 ☎ Fax: + 44 (0)20 8445 6803 ☎ E-mail: jeckstein_assoc@compuserve.com
[VAT Number : 544 5160 55]

I am seeking your assistance at this time because historic churches are rightly regarded as the "jewels in the crown" of the UK's built heritage, and this new assessment is an important step towards ensuring that they remain so. The ultimate goal of the review is to help direct funding for historic churches where it is most needed, which is an objective I'm sure we all share. By determining their needs at the present time we can better plan for their repair and maintenance in the future. Derek Taylor-Thompson, Secretary of the Churches Main Committee, has also given this work his strong support and endorsement, and joins me in thanking you for your co-operation.

Yours sincerely,

A handwritten signature in black ink, appearing to read 'J. Eckstein', with a large, sweeping flourish underneath.

Jeremy Eckstein

Questionnaire follows / .

1. In retrospect, with regard to the review undertaken for the *Churches Needs Survey*, do you feel that it generally provided a reasonably accurate assessment of the repair needs of your church at the time.

2. How much of the work assessed at the time as being Urgent or Medium Term was subsequently carried out as planned within the appropriate time scale. How was it funded, and how did the actual costs compare with the estimated costs given in the assessment.

3. For any work assessed as being Urgent or Medium Term which was not carried out as planned, what were the reasons for it being postponed (shortfalls in fundraising, changed priorities resulting from unplanned emergency work, etc.)

4. In respect of work identified at the time as being Deferrable, and which has not yet been commenced, what is your opinion as to the likelihood of it being carried out: (a) within the next 2 years, (b) within the next 2 – 5 years.

5. Was it necessary to carry out any work during the period 1995 – 2000 which was not anticipated in the Report? Please give details, including cost and source(s) of funding.

Thank you for your cooperation

Ref. S1/«Ref»

The 33 County Historic Churches Trusts are:

Bedfordshire & Hertfordshire Historic Churches Trust
Royal County of Berkshire Churches Trust
Buckinghamshire Historic Churches Trust
Cambridgeshire Historic Churches Trust
Historic Cheshire Churches Trust
Cornwall Historic Churches Trust
Derbyshire Historic Churches & Chapels Trust
Devon Historic Churches Trust
Dorset Historic Churches Trust
Friends of Essex Churches
Gloucestershire Historic Churches Preservation Trust
Hampshire & The Islands Historic Churches Trust
Herefordshire Historic Churches Trust
Friends of Kent Churches
Leicestershire Historic Churches Trust
Lincolnshire Old Churches Trust
Norfolk Churches Trust Ltd
Northamptonshire Historic Churches Trust
Northumbria Historic Churches Trust
Nottingham Historic Churches Trust
Oxfordshire Historic Churches Trust
The Romney Marsh Historic Churches Trust
Rutland Historic Churches Trust
Shropshire Historic Churches Trust
Friends of Somerset Churches and Chapels
Staffordshire Historic Churches Trust
Suffolk Historic Churches Trust
Surrey Churches Preservation Trust
Sussex Historic Churches Trust
Warwickshire and Coventry Historic Churches Trust
Wiltshire Historic Churches Trust
Worcester and Dudley Historic Churches Trust
Yorkshire Historic Churches Trust

Historic churches are rightly regarded as the "jewels in the crown" of the UK's built heritage and this new assessment is an important step towards ensuring that they remain so. By determining their needs at the present time we can better plan for their repair and maintenance in the future. Derek Taylor-Thompson, Secretary of the Churches Main Committee, has also given this work his strong support and endorsement, and joins me in thanking you for your co-operation.

Yours sincerely,

A handwritten signature in black ink, appearing to read "J. Eckstein". The signature is stylized with a large, sweeping initial 'J' and a long, horizontal flourish underneath.

Jeremy Eckstein

Letter and Questionnaire used in surveying the County
Historic Churches Trusts

JEREMY ECKSTEIN ASSOCIATES
CULTURAL & HERITAGE SECTOR RESEARCH

«Contact_Person»
«Name_of_Trust»
«Address_Line_1»
«Address_Line_2»
«Address_Line_3»
«Town»
«County»
«Post_Code»

22 June 2001

Dear colleague,

Joint Grant Scheme for Churches and other Places of Worship

The Heritage Lottery Fund is currently reviewing its policy and delivery of grants to places of worship. As part of this review process, I have been asked by the Fund and English Heritage to carry out an assessment of the needs of listed places of worship in use across the UK, and how the *Joint Grant Scheme for Churches and other Places of Worship* meets these needs in England. This assessment will update the information provided by the *Churches Needs Survey* which was published three years ago (but based on considerably earlier data). The ultimate goal of the review is to help direct funding for historic churches where it is most needed, which is an objective I'm sure we all share.

As part of this assessment process, I would be grateful if you would please take the time to complete the enclosed questionnaire, which is being sent to each of the County Historic Churches Trusts as well as to a number of other trusts and foundations which grant-aid repairs to churches.

In order to meet the timetable for the overall HLF review of which this is a part, I must ask you please to complete and return the questionnaire direct to me at the address below at your earliest convenience, but in any event so that it reaches me no later than **Friday 13 July**. I am enclosing a stamped addressed envelope for this purpose. If you have any specific questions about completing the questionnaire, please call me at any time. Alternatively, if you would like to discuss any other aspect of the study, please call either Judith Cligman at the HLF (on 020 7591 6126), Richard Halsey at English Heritage (01223 582700) or Thomas Cocke at the Council for the Care of Churches (020 7898 1882).

7 Chandos Avenue, Whetstone, London N20 9ED

Tel : + 44 (0)20 8445 4334 ☎ Fax : + 44 (0)20 8445 6803 ☎ E-mail : jeckstein_assoc@compuserve.com
[VAT Number : 544 5160 55]

JOINT GRANT SCHEME FOR CHURCHES AND OTHER PLACES OF WORSHIP

➤ AN ASSESSMENT OF NEEDS ◀

The Heritage Lottery Fund is currently reviewing its policy and delivery of grants to places of worship. This assessment questionnaire, commissioned by the Heritage Lottery Fund and English Heritage, is designed to assess the future needs of listed places of worship across the UK, and how the *Joint Grant Scheme* can meet these needs in England. It is an important part of the review process, and will update the information gathered by the 1998 *Churches Needs Survey*.

So as to be consistent with the classification adopted by the Joint Grant Scheme, the questionnaire seeks to distinguish between building repairs that meet the current Joint Scheme criteria and repairs that do not meet the criteria, and to assess levels of priority for work carried out. The questionnaire also includes questions relating to necessary maintenance and minor structural repairs.

The purpose of the survey is to obtain information on needs, rather than produce a snapshot of expenditure. However it is still important to work within a consistent time frame. This questionnaire specifically seeks information about work carried out during the most recent 24 month period for which you are able to supply information; please limit your answers to work actually carried out or approved during that period. If you are not able to give precise figures, please give your best estimates. Please identify projects individually where possible; only give aggregates if individual details are not available. If there is insufficient space under any question for you to give a full answer, please continue on an additional sheet of paper.

In order to meet the timetable for the overall HLF review of which this is a part, please complete this questionnaire and return it to me at your earliest convenience, but in any event so that it reaches me **no later than Friday 13 July**, using the stamped addressed envelope provided.

Thank you for your co-operation.

Ref. S4a /

1. a) Name of your Trust / Foundation _____
b) Address _____

2. To what specific 24 month period does the information relate?
From _____ to _____

3. How many listed churches and other places of worship have you grant-aided during the period?
Grade I / II* _____
Grade II / other _____

4. Do your own funding priorities favour part funding of projects which are already supported by the Heritage Lottery Fund, English Heritage or other grant-aid programmes, or full funding of work which might otherwise not attract funding from other sources.

cont. / - - - - -

- 5. Please give details of all building repair and maintenance work that you grant-aided during the period, as follows:
 - Under the Classification heading below, please use the following letters to indicate the nature of the work:
 - Q = Urgent building repair work, which was classified as being essential to secure the continued use of the building as a place of worship, and which met the current Joint Scheme eligibility criteria (*the Joint Scheme criteria covers: • urgent high-level repairs; • repairs to historic fabric at risk of imminent loss; • other urgent and essential repairs to form part of a cost-effective single project*);
 - N = Urgent building repair work which was classified as being essential to secure the continued use of the building as a place of worship, but which did not meet the current Joint Scheme eligibility criteria;
 - I = Necessary maintenance work or minor structural repairs which was not eligible for Joint Scheme support.
 - Under the Priority heading below, please use the following letters to indicate the urgency of the work:
 - A = Within the next two years;
 - B = Between 2 – 5 years.
 - Under the Other Sources of Funds heading below, if your grant represented only part of the total cost of any of the work detailed, please give details of any other funding sources where known, including contributions from within the congregation, fund raising appeals etc. (*mark "x" where there is another source, but you are not able to name it*).

Name of Place of Worship	Listed Grade	Brief Description of Work	Class. of Work (Q, N, I)	Priority (A, B)	Approx. Amount of Grant	Other Sources of Funds

cont. / - - - -

5. cont. /

Name of Place of Worship	Listed Grade	Brief Description of Work	Class. of Work (Q, N, I)	Priority (A, B)	Approx. Amount of Grant	Other Sources of Funds

This survey is being carried out independently, on behalf of the Heritage Lottery Fund and English Heritage, by Jeremy Eckstein Associates (Cultural & Heritage Sector Research). If you have any questions regarding this survey, please contact Jeremy Eckstein direct on:
Tel: (020) 8445 4334 / Fax: (020) 8445 6803 / E-mail: jeckstein_assoc@compuserve.com

**Please remember to return your completed questionnaire no later than Friday 13 July direct to Jeremy Eckstein Associates at:
7 Chandos Avenue, Whetstone, London N20 9ED, using the stamped addressed envelope provided.**
Once again, thank you for your co-operation.

The Oxford Preservation Trust
The James Pantyfedwen Foundation
The Pennycress Trust
The Pilgrim Trust
The Carew Pole Charitable Trust
Sainsbury Family Charitable Trusts
The Freida Scott Charitable Trust
The Jessie Spencer Trust
The Bernard Sunley Charitable Foundation
Sutton Coldfield Municipal Charities
The William Webster Charitable Trust
The Welsh Church Acts Fund
Garfield Weston Foundation
The Wolfson Foundation
The Woodroffe Benton Foundation