

# Requesting changes to projects awarded Strategic Development Funding

## Introduction

1. With any project, there are often circumstances or events which necessitate a change to the original project plan. This note aims to help ensure that the process for changing any element of your award of Strategic Development Funding is as straightforward as possible, whilst ensuring that we have enough detail to make a decision and to provide our financial auditors with the information that they need. As per the funding agreement, you should not reallocate any spending without written authorisation from us.

### *When to contact us and what is the process*

2. Please contact your Delivery Partner to discuss the potential change before submitting a formal request to check whether it will require a formal change request, and how best to manage the process.

There are different approval systems for different levels of change. Please see below for the guide to approval limits:

**Changes with an impact on the budget of under £50,000 and/or with no substantive impact on other elements of the project (for example not a change of leadership role, alteration to the theory of change, methodology or outcomes or moves of budget from revenue items to capital),** will be subject to approval via exchange of email by the project lead in the Strategy and Development Unit (SDU). If considered appropriate, they may require a change request form.

**Changes with an impact on the budget between £50,000 and £100,000** and/or with some impact on other elements of the project require a change request form, to be subject to approval approved by the SDU Head of Funding.

**Changes with an impact on the budget of over £100,000** require a change request to be referred to the Head of the Strategy & Development Unit and will be submitted to the Board for deemed approval.

Notwithstanding the limits above, **any changes which are likely to have a material impact on the project will be taken to the Board for discussion**, or where we have concerns - e.g. changes of leadership role, alteration to the theory of change, methodology, or outcomes, or requests to move funds from budget from revenue items to capital.

3. Once you are aware that a change is required, please ensure you seek our agreement before going ahead. To simplify this process, as well as enabling both the diocese and the Strategic Development Unit to keep a clear record of any changes and the authorisation given, we have developed a simple change request form. If you have additional material (e.g. an internal paper explaining the changes or a revised job description) please attach it.

4. This form should be completed and sent by email to David Jennings [david.jennings@churchofengland.org](mailto:david.jennings@churchofengland.org) who will review the request and authorise the changes if appropriate. The signed form will then be returned to you as confirmation that the changes can proceed. There may occasionally be instances when, if there is a significant change request made,

the Strategic Investment Board will need to review and authorise it. We can discuss this with you if the need arises.

***What information do we need?***

5. Please outline clearly which area of the project that you wish to change and what the rationale behind this is.
6. Please let us know if this change will alter the overall project budget or annual phasing of expenditure. If so, please also send us a revised cashflow forecast.
7. Please outline when you would like the change to take place. If it is for a change in post, please ensure that you send across updated job descriptions once the change has been agreed.

Strategy & Development Unit  
Church House SW1

September 2020

Appendix I



**Strategic Development Fund Change Request**

<b>Diocese</b>	
<b>Project Title</b>	
<b>SDU Reference number:</b>	
<b>Please describe <u>briefly</u> what changes you propose to make?</b>	
<b>What is the rationale behind this?</b>	
<b>What is the impact on the project budget? (Please attach a revised budget forecast)</b>	
<b>Does this impact on your project milestones or outcomes?</b>	
<b>When will this proposed change take place?</b>	

**Agreed by:**

**Date agreed:**

2019