



Church Building Projects: Purpose, Planning, Procurement

Diocese of Southwell & Nottingham – 23 October 2018

Nick Jenni, National Procurement Officer
nicolas.jenni@churchofengland.org





Acknowledgements

Much of this material has been produced by others, and is reproduced here with their generous permission.

Particular thanks to Nigel Walter and Jim Hammett, for the material from their excellent website www.churchbuildingprojects.co.uk and to Nigel Walter & Andrew Mottram for the material used from their book *Buildings for Mission*.

Thanks too for their detailed and constructive criticism to Dr David Knight and Dr Joseph Elders (Cathedral and Church Buildings, Church of England), Michael Murray (National Churches Trust), Robert Bowles (Cathedrals Fabric Commission for England, Southwark DAC), Ven. Michael Everitt (Archdeacon of Lancaster, Church Buildings Council), Geoffrey Hunter (Church Building Consultant, Ely, Church Buildings Council), and Robert Kennett (Eric Parry Architects), and to those who attend the workshop like you

Presentation and handouts will be made available on www.parishresources.org.uk and an email will be sent to you when it is published

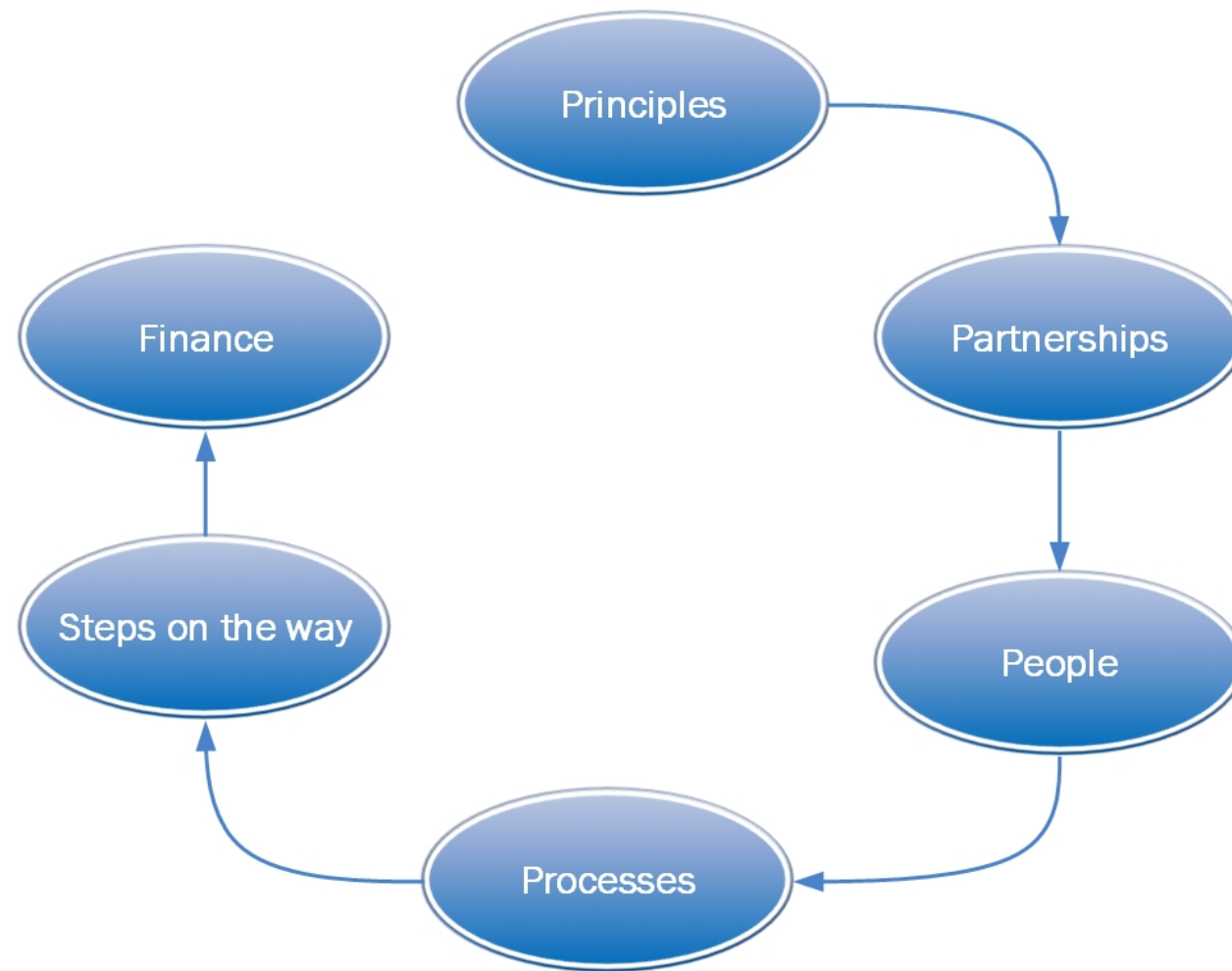


09.30 am	Registration, refreshments
10.00 am	Welcome and introductions
10.25 am	Introduction and session 1: Principles
11.10am	Break, coffee
11.30am	Session 2: Partnerships
12.15pm	Session 3: People
01.00pm	Lunch
01:45pm	Session 4: Processes
02.30pm	Session 5: Steps on the Way
03.00pm-03.15pm	Tea
03.15pm	Session 6: Finance
03.50pm	Wrap-up and feedback





Church Building Projects: Purpose, Planning, Procurement



What to expect from this workshop

It will help identify the steps to consider in planning and undertaking a church building project, the jobs which need to be done, the responsibilities taken on and how to be a good client for the people who design and build the project.

Detailed information on funding is not part of the information, nor any help on the specific design, size or style of the project.





Objectives

- Establishing the importance of **community engagement** in defining the **purpose and scope** of your project
- Understanding the need to **plan, organise and budget** to achieve good governance and **sustainability** after **opening**
- Accepting that good **communication** with your **stakeholders** is vital to a successful project.
- Recruiting, contracting and **procuring** the right team members, professionals and contractors is key to your success and in getting value for the funds you spend
- **What are your objectives?**





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CHURCH BUILDING PROJECTS



Purpose
Planning
Procurement



Commitment
Contribution
Participation
Mission





The Journey

- Preparing for change - teaching
- Impact on church's ministry
- Preparing for the new
- Fundraising

www.parishresources.org.uk/buildingprojects



Handouts
1-5



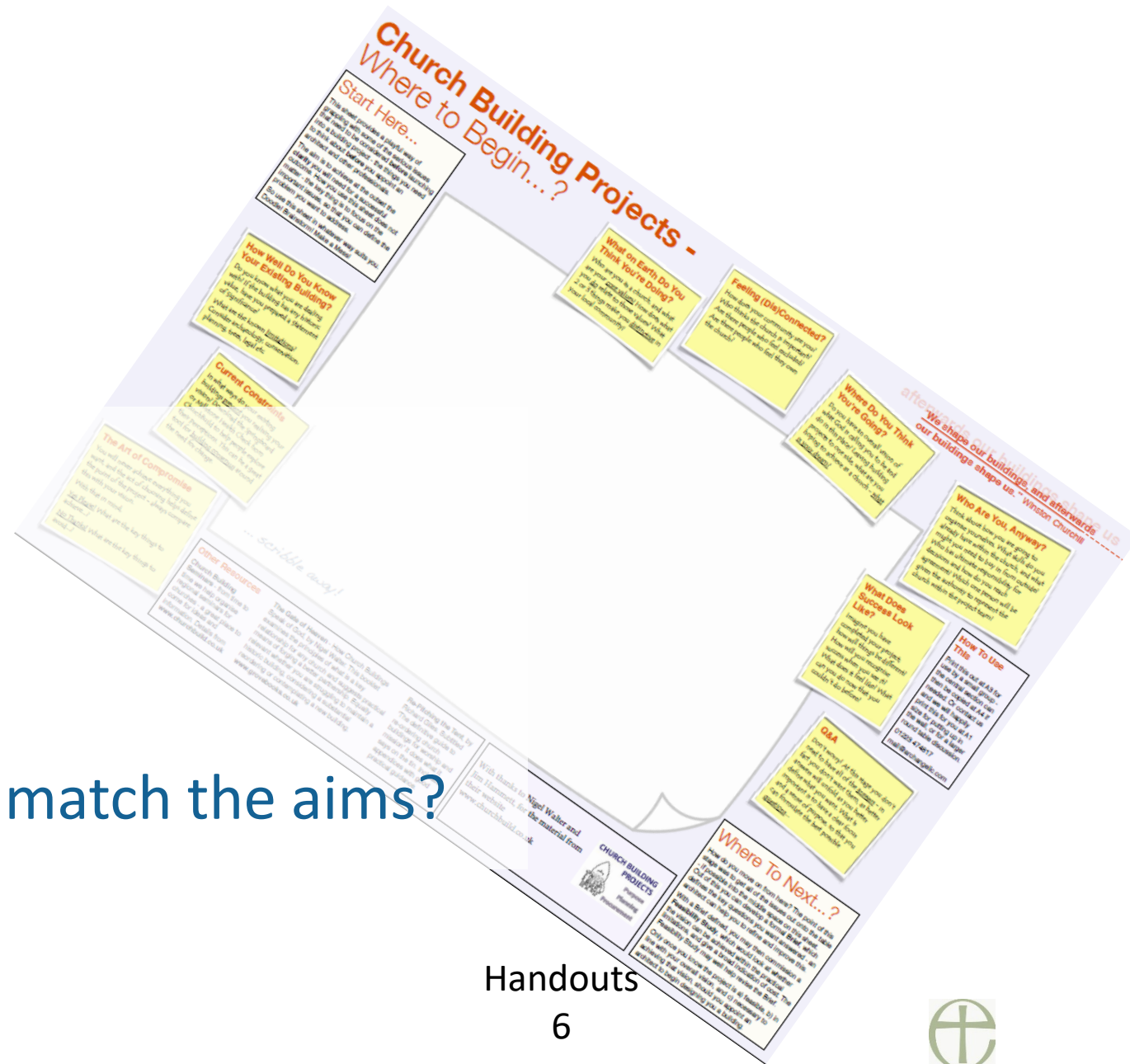
....and afterwards

Using the handout, score your church on 10 criteria
– after you have your design



Purpose

- . Aims?
- . Who needs it?
- . Do they want it?
- . Who's involved?
- . How does the planned work match the aims?



Handouts



Church Building Projects - Where to Begin...?

Start Here...

This sheet provides a playful way of grappling with some of the serious issues that need to be considered **before** launching into a building project - the things you need to think about **before** you appoint an architect and other professionals.

The aim is to achieve at the outset the **clarity** you will need for a successful outcome. How you use this sheet does not matter - the key thing is to focus on the important issues, so that you can define the problem you want to address.

So use this sheet in whatever way suits you. Doodle! Brainstorm! Make a Mess!

How Well Do You Know Your Existing Building?

Do you know what you are dealing with? If the building has any historic value, have you prepared a Statement of Significance?

What are the known **limitations**? Consider archaeology, conservation, planning, trees, legal etc

Current Constraints

In what ways do your existing buildings **prevent** you realising your vision? Download the Springboard or Milestone Health Check from ChurchBuild to help people explore their perceptions. This can be a great tool for **building consensus** around the need for change.

The Art of Compromise

You will never achieve everything you want, and the act of choosing helps define the point of the project - always compare this with your vision.

With that in mind...

Yes Please! What are the key things to achieve...?

No Thanks! What are the key things to avoid...?

What on Earth Do You Think You're Doing?

Who are you as a church, and what are your **core values**? How does what you **do** relate to those values? What 2 or 3 things make you **distinctive** in your local community?

Feeling (Dis)Connected?

How does your community see you? Who thinks the church is important? Are there people who feel excluded? Are there people who feel they own the church?

Where Do You Think You're Going?

Do you have an overall vision of what God is calling you to be and do in this place? Leaving building projects to one side, what are you hoping to achieve as a church - **what is your dream?**

Who Are You, Anyway?

Think about how you are going to organise yourselves. What skills do you already have within the church, and what might you need to buy in from outside? Who has ultimate responsibility for decisions and how do you reach agreement? Which one person will be given the authority to represent the church within the project team?

What Does Success Look Like?

Imagine you have completed your project: how will things be different? How will you recognise success when you see it? What does it feel like? What can you do now that you couldn't do before?

How To Use This

Print this out at A3 for use by a small group - the central section can then be copied at A4 if needed. Or contact us and we will happily print this for you at A1 size for putting up in the wall, or for a larger round table discussion.

01223 474817
mail@churchangelic.com

Q&A

Don't worry! At this stage you don't need to have all of the **answers** - in fact you don't want them, as better answers will unfold as you better define what you want. What is important is to have a clear focus and a sense of purpose, so that you can formulate the best possible **questions**...

Where To Next...?

How do you move on from here? The point of this stage was to get all of the issues out onto the table - if possible into the middle space on this sheet. Out of this you can develop a formal **Brief**, which defines the key questions you want answered - an architect can help you to refine and improve this.

With a Brief defined, you may then commission a **Feasibility Study**, which would look at whether the vision can be achieved within the practical limitations, and give a broad indication of cost. The Feasibility Study may well help revise the Brief.

Only once you know the project is a) feasible, b) in line with your overall vision, and c) necessary to achieving that vision, should you appoint an architect to begin designing you a building.

... scribble away!

Other Resources

Church Building Seminars - from time to time we help organise regional seminars for churches - a great place to come for ideas and information. Details from www.churchbuild.co.uk

The Gate of Heaven - How Church Buildings Speak of God, by Nigel Walter. This booklet examines the principles of what is a key relationship for any church and suggests practical means of forging a better partnership. Equally relevant whether you are struggling to maintain a historic building, considering a substantial reordering or contemplating a new building. www.grovebooks.co.uk

Re-Pitching the Tent, by Richard Giles. Subtitled 'The definitive guide to re-ordering church buildings for worship and mission' it does what it says on the tin. Includes appendices with good practical guidance.

With thanks to Nigel Walter and Jim Hammett, for the material from their website
www.churchbuild.co.uk

CHURCH BUILDING PROJECTS



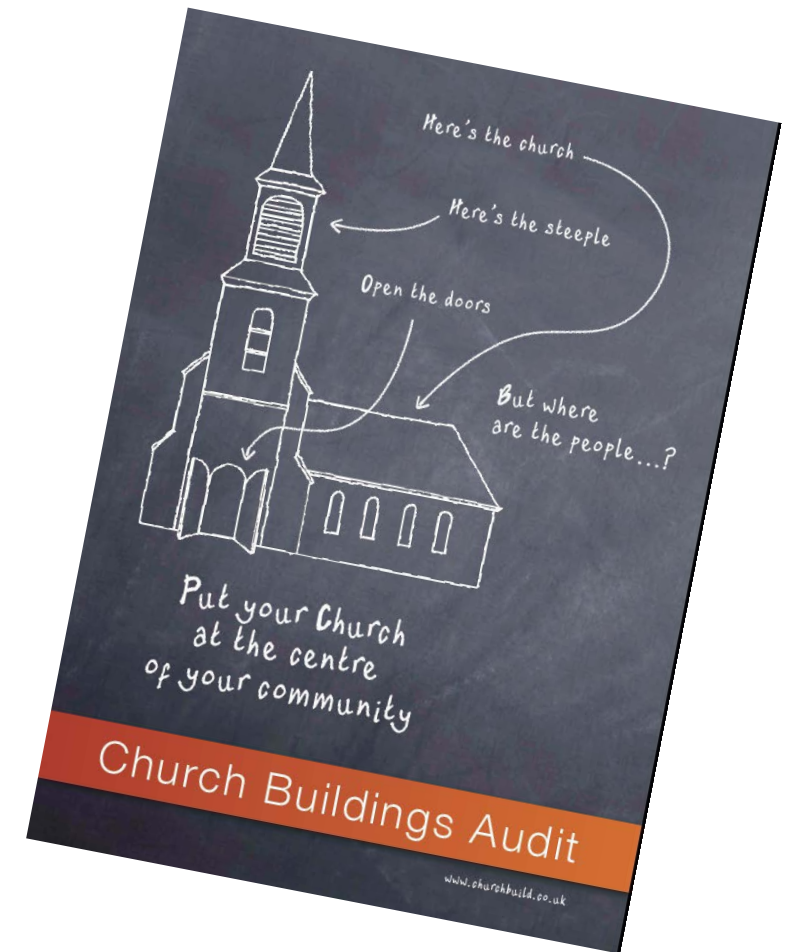
Purpose
Planning
Procurement



afterwards our buildings shape us
"We shape our buildings, and afterwards
our buildings shape us." Winston Churchill

Narrative: story of the building

- Is your church building just a museum or work of art?
- Is your church building just a worship centre?
- Story is way people come to terms with change
- Using church building audit to build narrative



1. Where have you come from?

a) Talkative buildings

Your church building is talking all the time, but what is it actually saying?

1. About its history?

2. About the community for which it was built and those communities that have made adaptations since?

3. About the purpose for which it was built and the reasons for any change?

4. About its purpose today - how do you use it now?

5. Is it cared for? And therefore will I be cared for?

- What does that teach us about the relationship between God (theology)?
- worship (liturgy)?
- the community (social history)?

Does the building suggest that God is absent, worship irrelevant and the community excluded? Or does it speak instead of relevance and the integration of God and community?

b) How would you describe your building's character?

1. **What are the general characteristics of the building** - large, small, spacious, light, cluttered, dark, tidy ...? What are the shapes of the spaces and levels? Can you see what is going on?
2. **Furniture and fittings** - do they help or hinder? Are they in the right place, or should some be discarded or used elsewhere? Which should be retained?



What is your Church saying?

2. Where are you now?



a) How does the worshipping community express its faith today?

'Any person or body carrying out functions of care and conservation under this Measure or under any other enactment or rule of law relating to churches shall have due regard to the role of a church as a local centre of worship and mission.' Care of Churches Measure (1991)

1. How does the PCC understand its 'worship and mission'?
2. What models of being the church do you resonate with?

- The house of God
- The house of the People of God
- The gate of heaven
- The Body of Christ
- The People of God
- A Temple of the Spirit
- A sign of the Kingdom
- Pilgrims on the Paschal Journey
- Something else...

3. Has the PCC considered how their preferred model(s) of the church can be proclaimed and expressed in its worship?
4. What should the church be proclaiming about its nature and mission by its liturgy and the arrangement of furniture and fittings, with special regard to:
 - Corporate worship and the Eucharist
 - Proclamation of and reflection on the Word of God?
 - The relationship of the members of the community to one another?

3. Where are you heading?

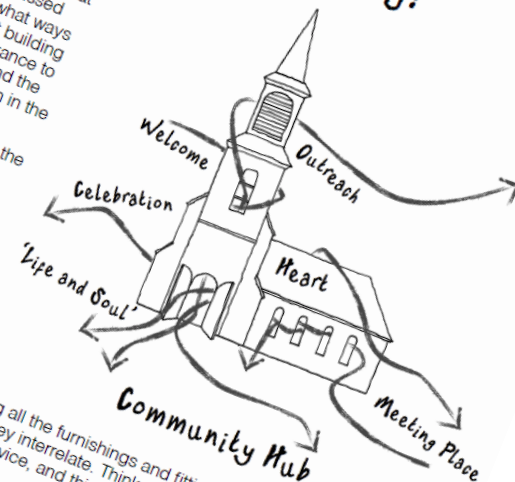
a) Dreaming the future...

1. Bearing in mind all that you have discussed together, in what ways is the present building a help or hindrance to your worship and the Church's mission in the community?
2. Think of consulting the Diocesan Advisory Committee or similar body about your worship or building. Consider arranging a Study Day or a visit to another church.

3. Think of a large plan of the church, showing all attached buildings, grounds and halls, removing all the furnishings and fittings, so that you can see the spaces and how they interrelate. Think of a large service with lots of people welcomed? Are visitors 'ambushed' with information, or can they see the service? Where will they sit, for which part(s) of the service, and on what? Can the congregation move, or use different parts of the church as well as sightlines? Can the visitor find the toilet, or the meeting place? Can the visitor find the toilet, or the meeting place? Can the visitor find the toilet, or the meeting place?

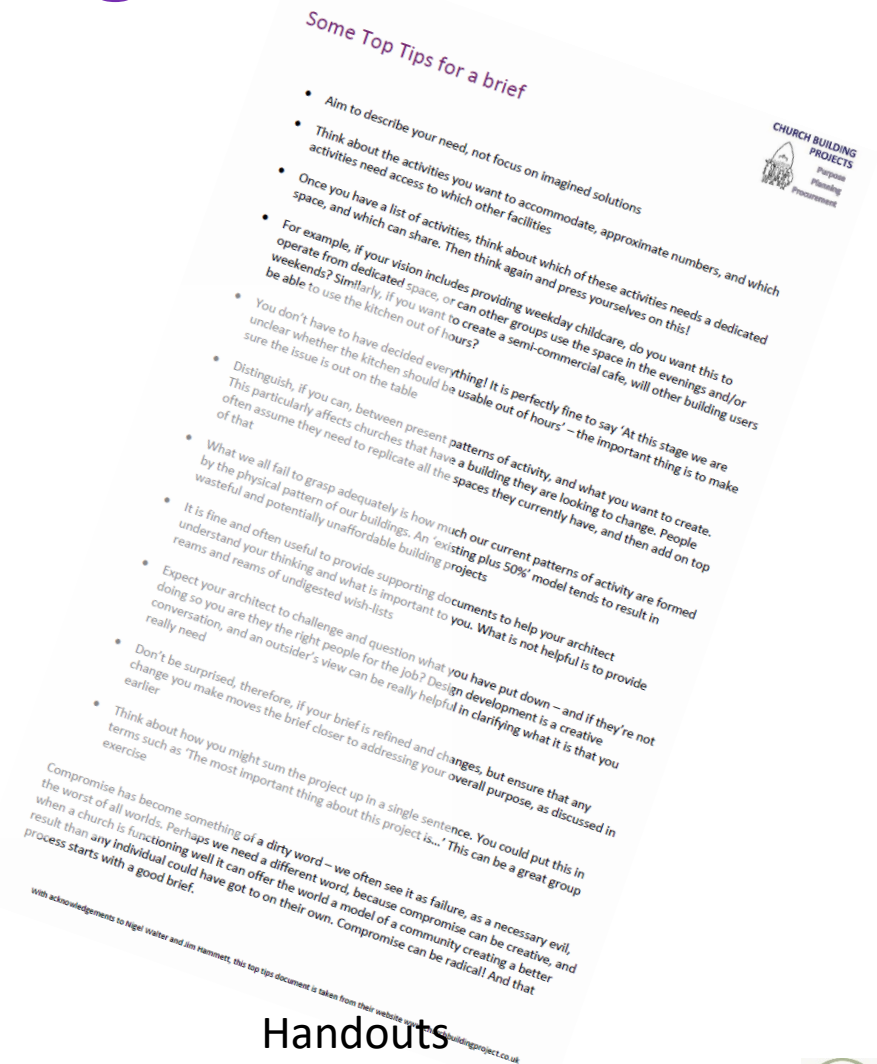
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- Corporate worship and the Eucharist
- Proclamation of and reflection on the Word of God?
- The relationship of the members of the community to one another?



Starting the process for a design

- Question not an answer
- Needs not solutions
- Present uses, future uses
- Collaboration is key
- Design is a response to brief



Handouts





Purpose



Short sharp exercise to discuss the bullet points for a client brief –15 minutes



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[Churches Conservation Trust](#)

Bath & Wells:
Mrs Sarah Davis
Bath & Wells DAC Secretary
14 Market Place
WELLS
BA5 2RE
01749 674 747

Birmingham:
Mr Adrian Mann
Care of Churches Officer
Church of England - Birmingham
1 Colmore Row
BIRMINGHAM
B3 2BJ
0121 426 0405

Blackburn:





Need to plan

- Project route map
- Planning means a project management approach
- The time it all takes
- Grant application – need to reach RIBA stage 2, other conditions
- Various ways – GANTT chart

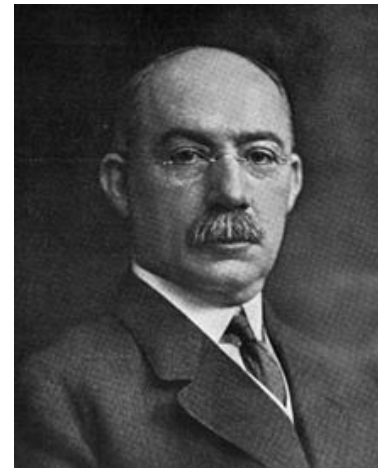


Handouts

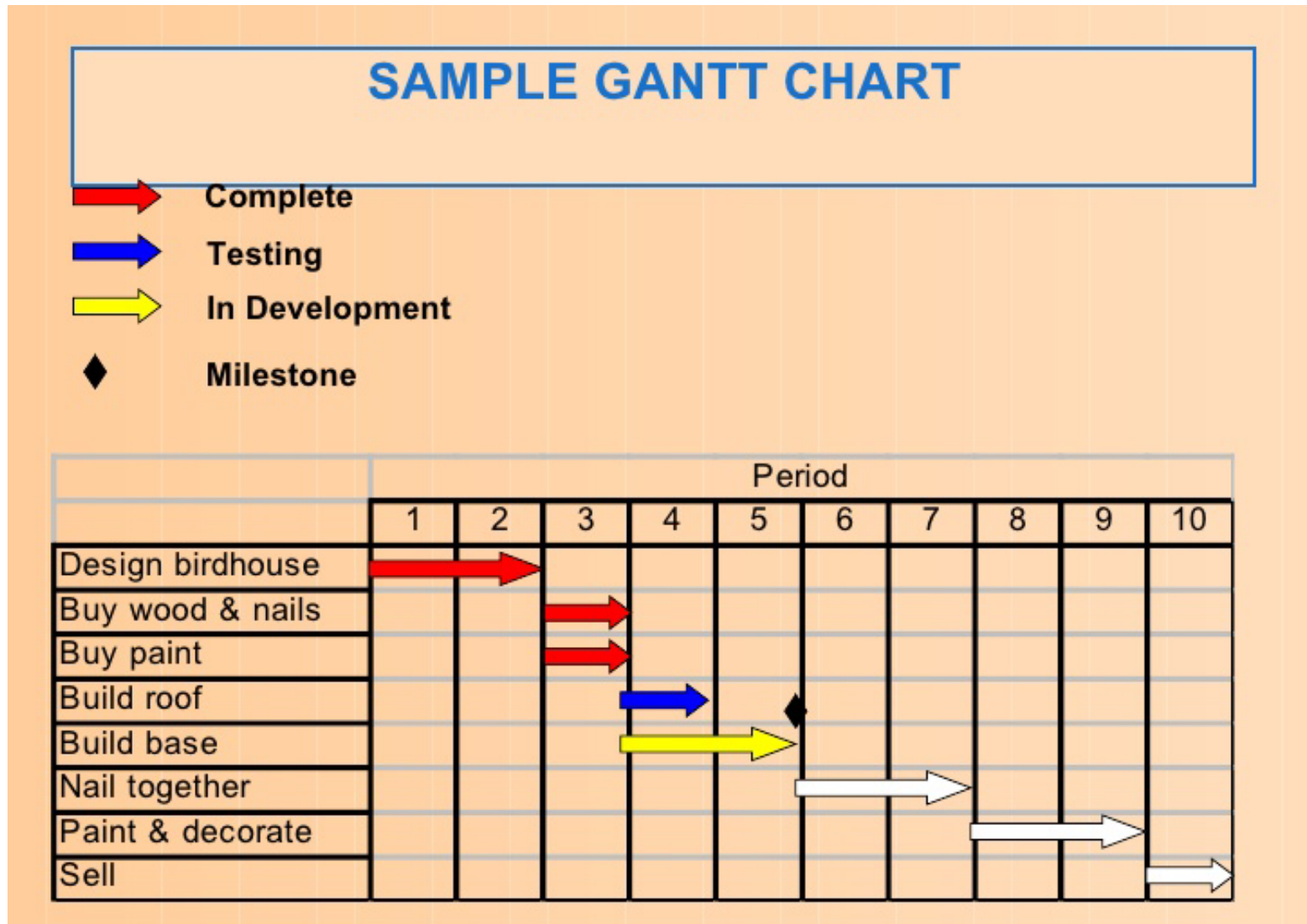


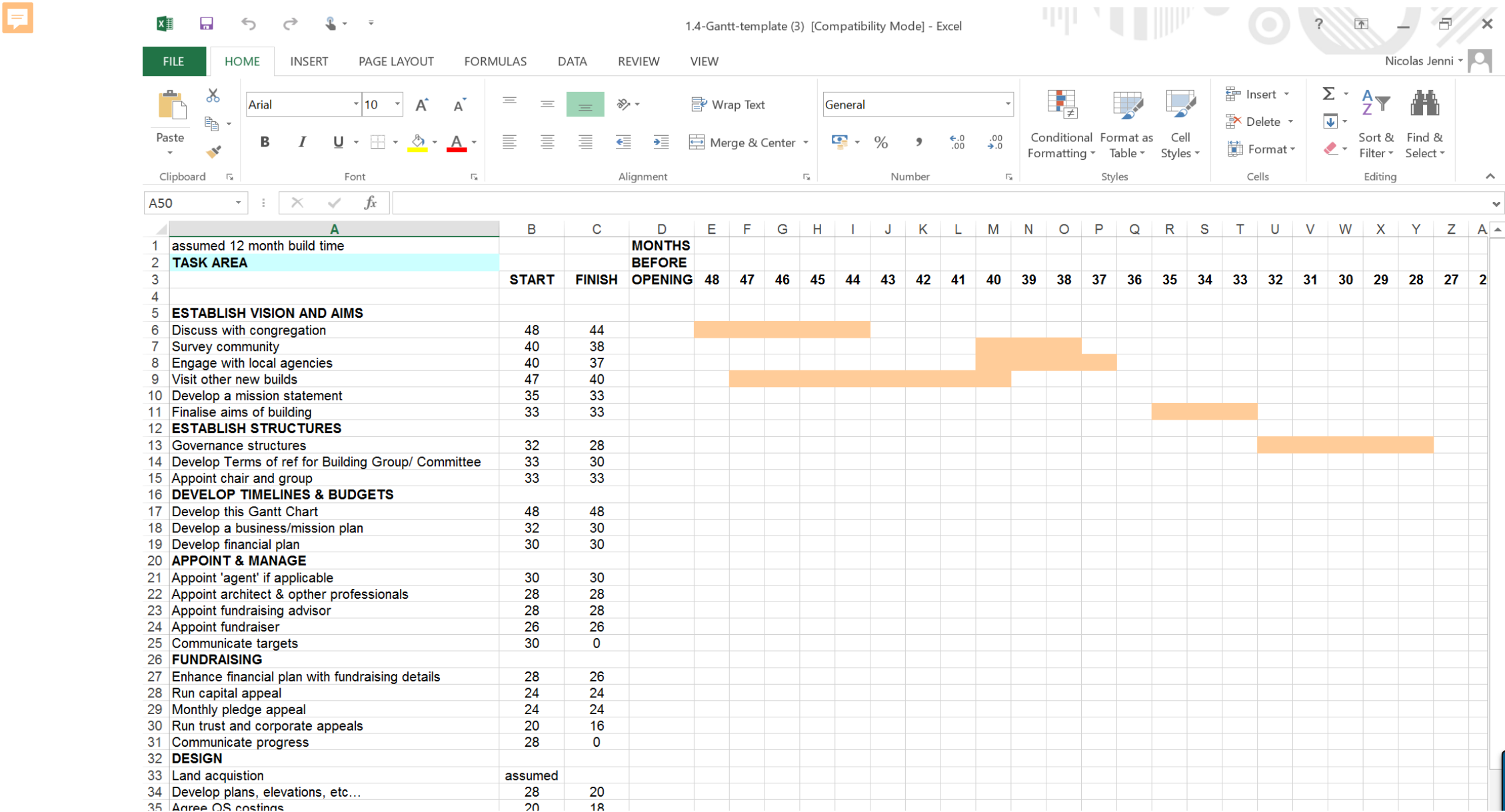
Planning - *Gantt chart*

- List of tasks
- Who has to do them
- How long each task takes
- What has to happen first
- What resources you need



Gantt chart – make a bird-table for sale





<http://www.parishresources.org.uk/wp-content/uploads/Gantt-Chart.xls>





View Basket

Product	Qty	Price per Unit	Price per Media	Price per Line		Media
Microsoft Project 2016	<input type="text" value="1"/>	£67.07	£10.00	£77.07	Remove	Media 64 Bit ▼

* Media (DVD/CD) will need to be purchased to enable you to install your first product licence. Further media purchases are not required for further licences of the same product.

[Continue Shopping](#)

[Go to Checkout](#)



16 minute tutorial: https://www.youtube.com/watch?v=sPwURRG9_Gs





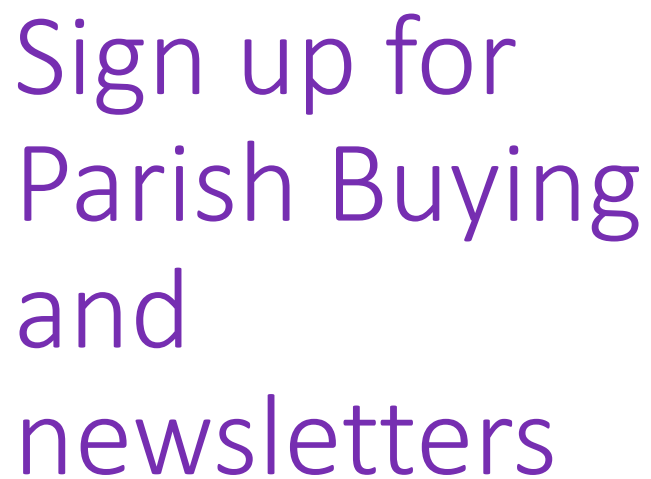
Sign up for Parish Buying and Parish Resources newsletters

- Parish Buying energy basket for electricity now 100% green
- Stationery, office and facilities management products
- LED bulbs from LED Hut
- Card readers
- Computer software from Phoenix
- Eventbrite for ticketing
- Church supplies with discount code
- Fire safety from Safelincs

New:

- Stand-alone donations units





From: David Knight
 To: David Knight
 CC: Cathedral and Church Buildings
 Subject: Regular message - Parish buy
 Date: 03 May 2017 14:03:38
 Attachments: images03.png

To All DAC Secretaries and CBC

Energy brokers
 We have become aware of a re
 these brokers are now targeti
 for individual dioceses, I wa
 For particular, the national

THE CHURCH OF ENGLAND

YR EGLWYS
YNG NGHMYRU

THE CHURCH IN WALES

ParishBuying

Parish Resources
 May Newsletter 2017

Dear Nick

Welcome to the second instalment of the Parish Resources Newsletter for 2017. With most churches fresh from their APCM, we're highlighting several resources which should be useful for those stepping into new roles.

Please do remember to ask new church wardens or parish treasurers to subscribe to this newsletter. They can do that here: <http://bit.ly/2p9CiUb>
 Or you can forward them this newsletter by [clicking here](#).

Changes to Grants for Places of Worship

The Heritage Lottery Fund has announced major changes to the way in which churches apply for funding, including the closure of the Grants for Places of Worship scheme later this year.

The Church and Cathedrals Building Division has produced a [briefing document](#) to guide dioceses and parishes as to our position on these changes and suggested next steps. They will update this document as matters progress.

Existing applications should not be affected and the next 2 terms of the scheme will run for 2017

IN THIS NEWSLETTER

- [1. HLF Changes](#)
- [2. Gift Aid Small Donations](#)
- [3. Legacy Materials](#)
- [4. New Treasurers Handbook](#)
- [5. Insurance Renewals](#)
- [6. Thy Kingdom Come](#)

2017 Energy
 d on electricity or gas last
 n your behalf.
 needs across thousands
 y in bulk, direct from

Basket we cut our

Basket is 1st

February -
 ice
 off their

heritage
lottery fund

Purpose

Sharing

Short discussion on planning – have you experience at your church (or elsewhere) – some tips or questions you would like to share?

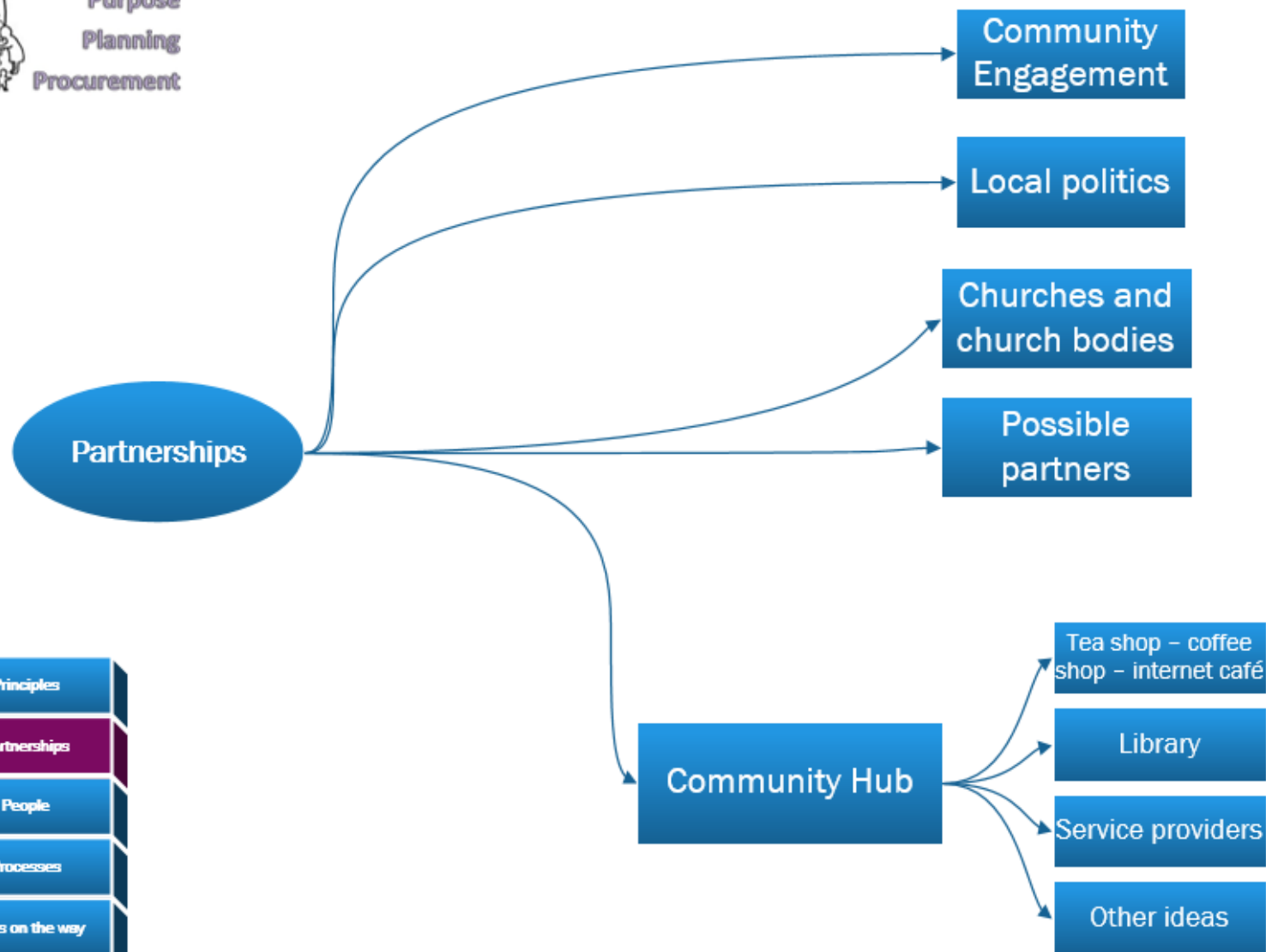




CHURCH BUILDING PROJECTS



Purpose
Planning
Procurement



Community Engagement

- Survey
- Consultation
- Public meeting
- Focus groups
- Schools/social atlas of your parish or area
- Draw up an influence/stakeholder map and meet them



Handouts
17-18





How much do you know about your community?

www.neighbourhood.statistics.gov.uk

Office for National Statistics

www.locality.org.uk - national network of community-led organisations

<http://arcg.is/2jg2x8J> with Church of England parishes and social deprivation information

Communities of interest : www.local-history.co.uk www.gov.uk/search-local-archives www.nationalarchives.gov.uk www.visitengland.com

Sample Community Survey

Devise your own survey questions – but here's an example to get started

Include covering letter with contact person's details for initial delivery every one week before you go door to door. For each question please tick the answers you think are relevant and then underline the most important.

1. Elderly People

What do you think elderly people would appreciate?

1. Regular day centre
2. Interest group (e.g. Scrabble, knitting, trir
3. Lunch club
4. Quiz afternoons
5. Dances

2. Parents

What do you think parents would appreciate?

1. After school clubs (11-14)
2. After school clubs (primary age)
3. Creche

3. Young People

Which of the following would you like?

1. Pregnancy advice
2. Advice relating to sex
3. Safe place for you
4. Advice relating to drugs

4. Finance

YOU WITH A COMMUNITY SURVEY

s Instructions.

XXX.

Hard if you have one and a pencil

Engaging with the community

- Check out the 'social atlas' in your area on line
- The Church of England research and statistics team have produced excellent Parish Spotlights, which are available from your directory website. In case you haven't already seen it, one copy is available as a handout.
- They also produced the Church of England parish directory <https://www.arcgis.com/home/item.html?id=bc079aa09a> which includes some useful information.
- A source of information.

where possible (this is viewed as a building so put a letter and a



Research & Statistics



Parishioners at glance

Population	2001 ¹	800
	2011 ²	800
Proportion Christian	2001 ¹	79%
	2011 ²	67%

Age Profile (2011²)

Age Group	Parish
0-4	5%
5-15	17%
16-64	60%
65+	17%

Issues to look out for in your parish

Local Amenities

Female Life Expectancy

Male Life expectancy

Housing Costs

Housing Conditions



Closer to home



- <https://www.nottinghamshireinsight.org.uk/>
- <https://www.nottinghaminsight.org.uk/>
- <https://www.newark-sherwooddc.gov.uk/planning/localdevelopmentframeworkldf/>
- <http://www.nottinghamshire.gov.uk/council-and-democracy/plans-policies-assessments/council-plans-policies/council-plan>

<http://www.parishresources.org.uk/wp-content/uploads/FG-5-Template-Community-Audit-Survey.docx>

<http://www.parishresources.org.uk/resources-for-treasurers/funding/funding-guides-capital-fundraising/>

https://www.planningportal.co.uk/info/200126/applications/70/community_infrastructure_levy





Purpose

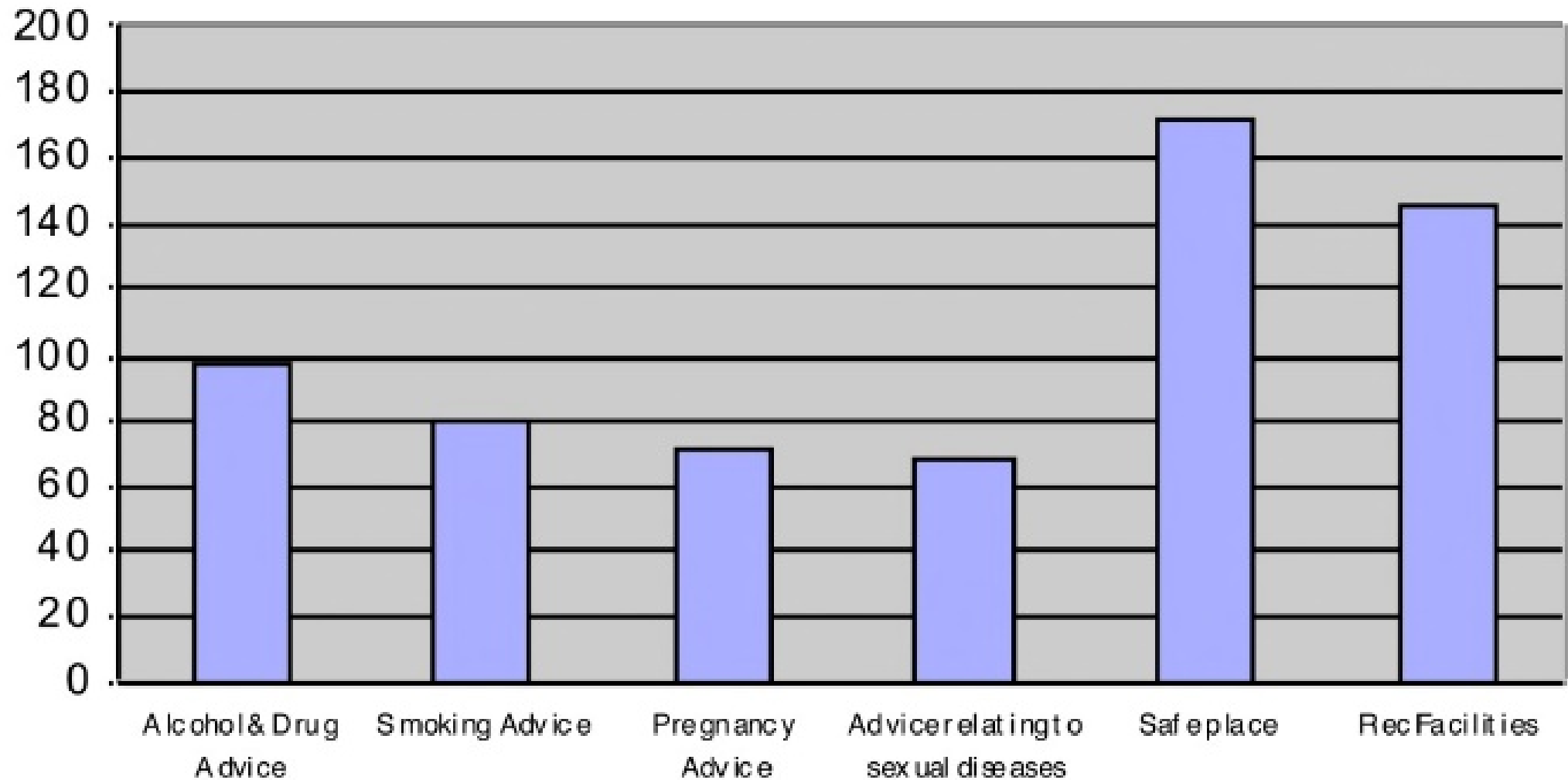
Sharing

Open forum on your experience of finding out what the needs are in your parish or area





People saying "Yes" to Young People Issues

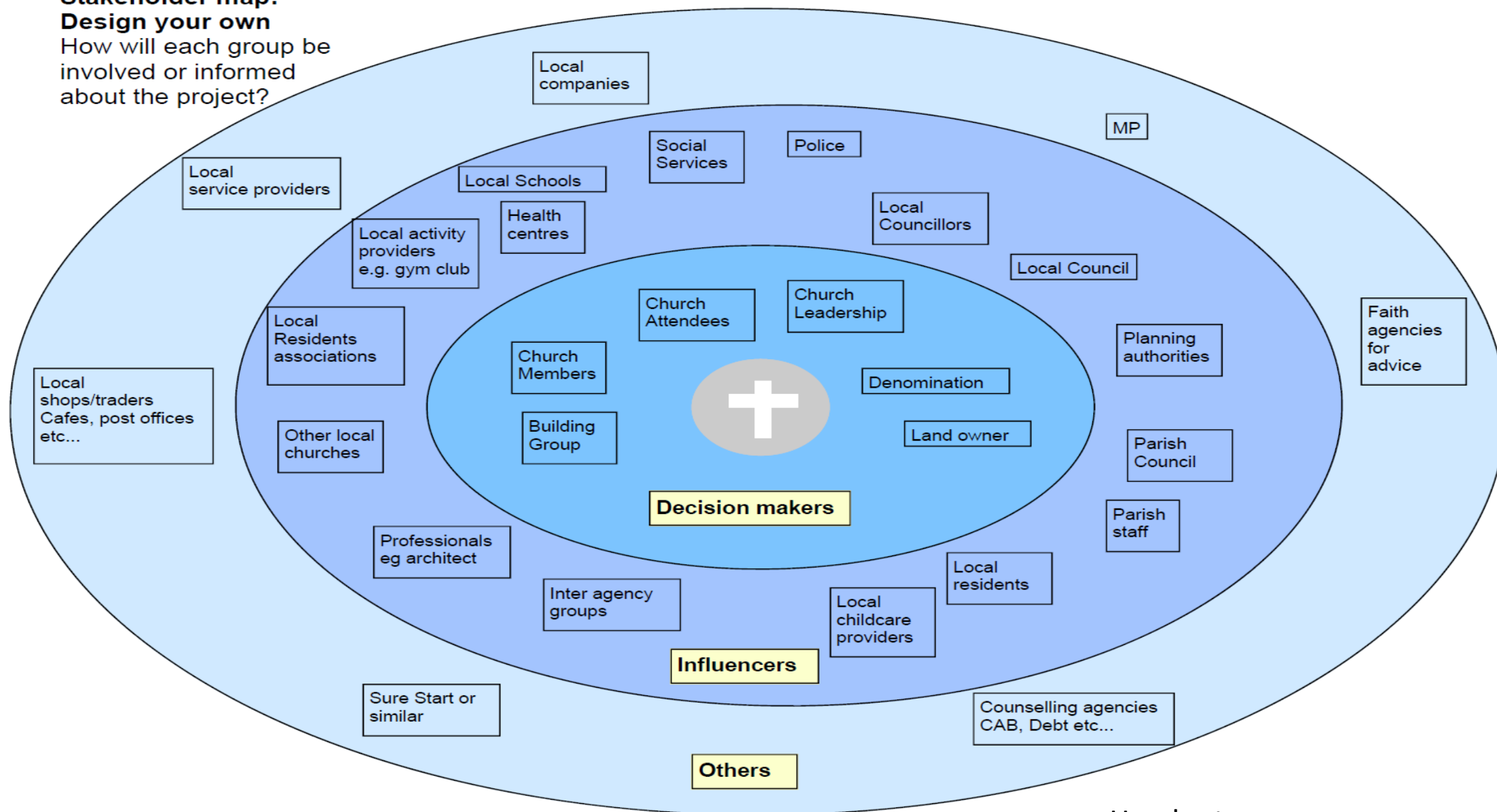




Stakeholder map:

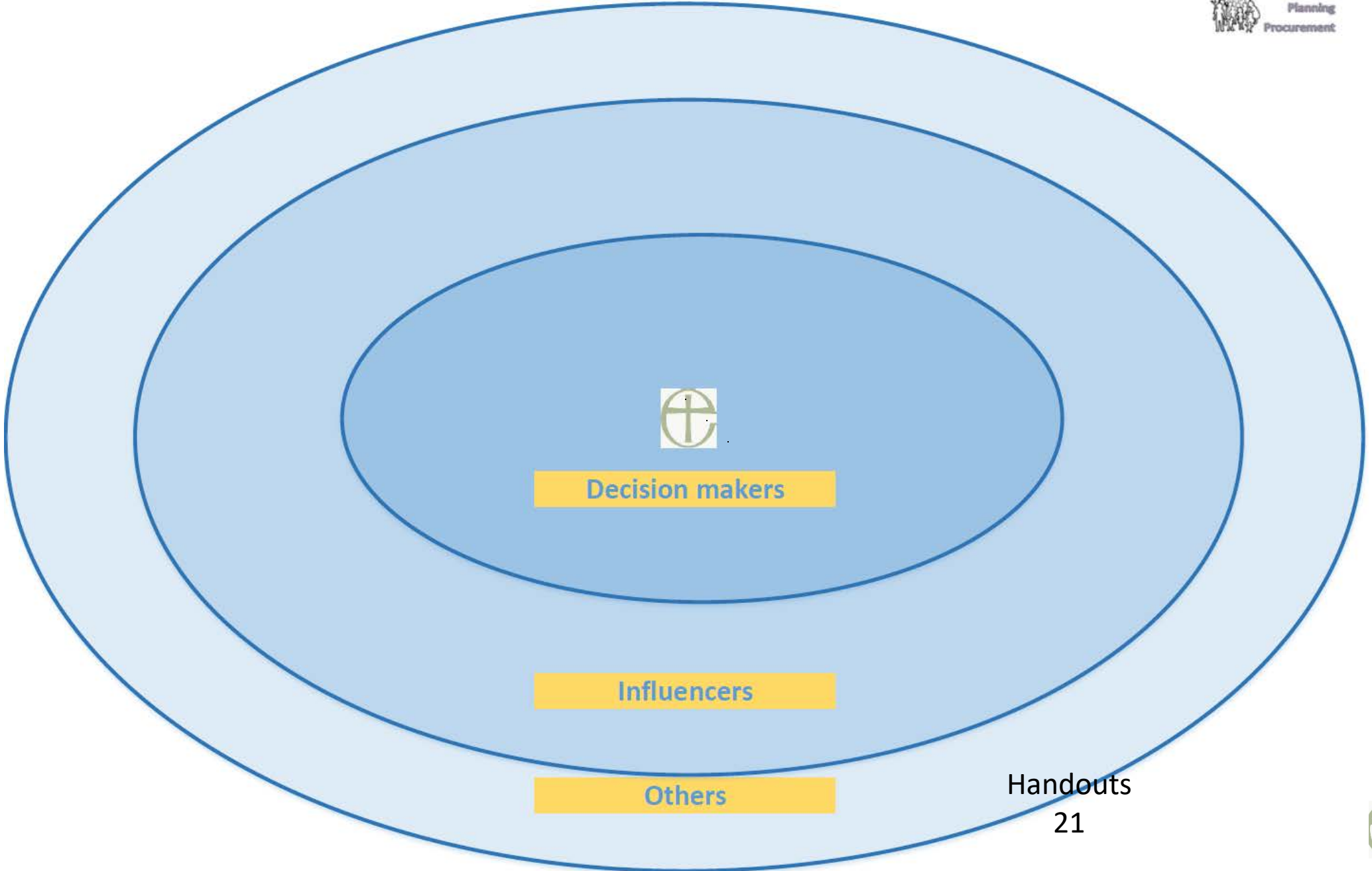
Design your own

How will each group be involved or informed about the project?



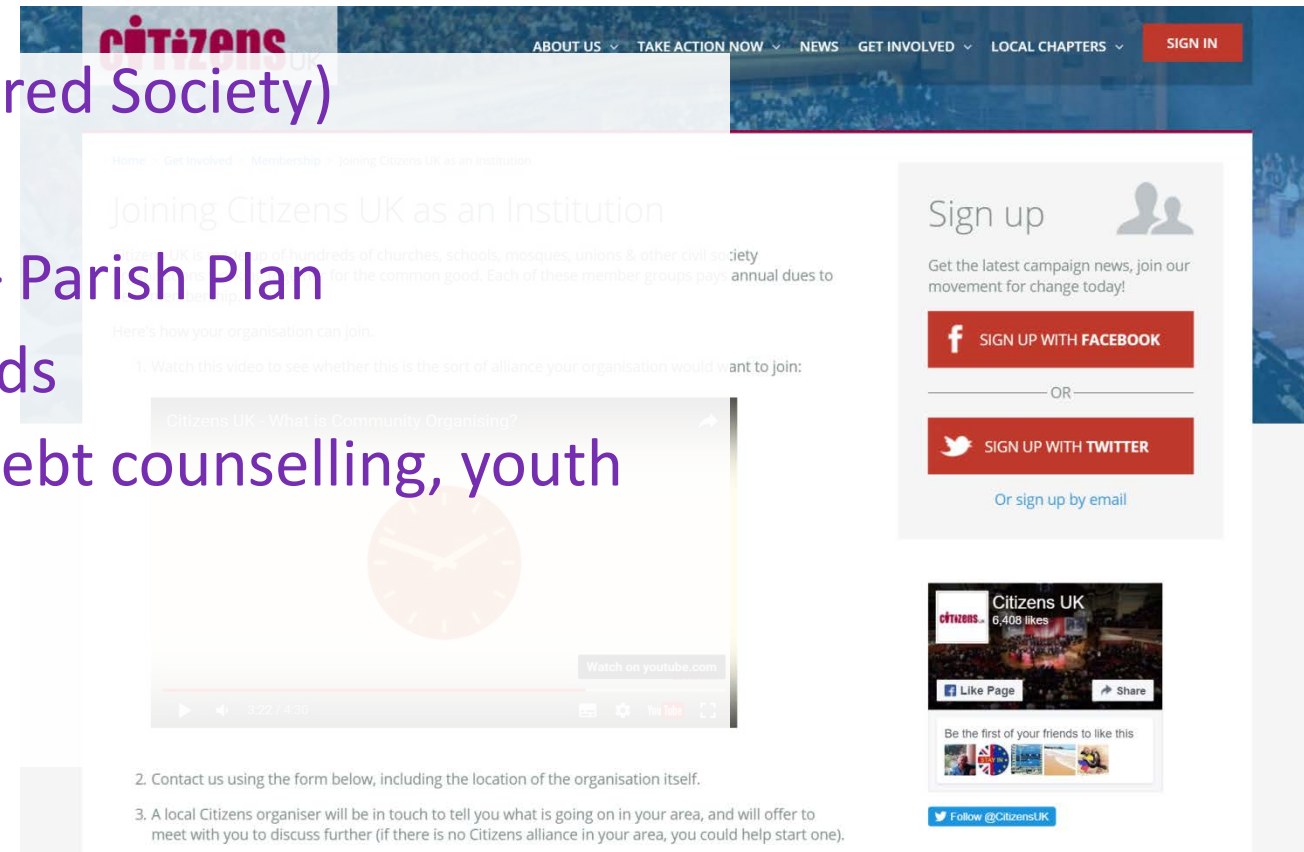


Your church's stakeholder map



Local Government & Politics

- Wider community (Big Society/Shared Society)
- Local councillors, MP, MEP
- Neighbourhood plan – Local Plan – Parish Plan
- Mission strategy fitted to local needs
- Pre-school childcare, food banks, debt counselling, youth work, elderly
- Community Foundation
- <http://www.citizensuk.org/>





Churches & Church Bodies

- Diocese, deanery
- Team, Benefice
- Local churches
- Churches Together



Possible Partners

- History of your church building
- Define desired outcomes
- Possible partners: childcare, café, local services, community shop, training providers
- Some principles: hospitality, key people, clarity on terms, clarity on agreement
- www.cinnamonnetwork.co.uk



Handouts





Community Hub

- Market
- Mission
- Be alive to the consequences
- Layout and other space needs
- Other opportunities
- Define desired outcomes



Some ideas

<http://www.churchbuildingprojects.co.uk/how-to/2-partnerships/2-4-cafes/>

<http://www.churchcare.co.uk/churches/open-sustainable>

<http://www.stpauloldford.com/vision/frequently-asked-questions/>

<https://www.hereford.anglican.org/Crossingthethresholdtoolkit/>

<http://www.inspirednortheast.org.uk/useful-information/>

https://www.canterburydiocese.org/media/outline/churchbuildings_winter2013.pdf

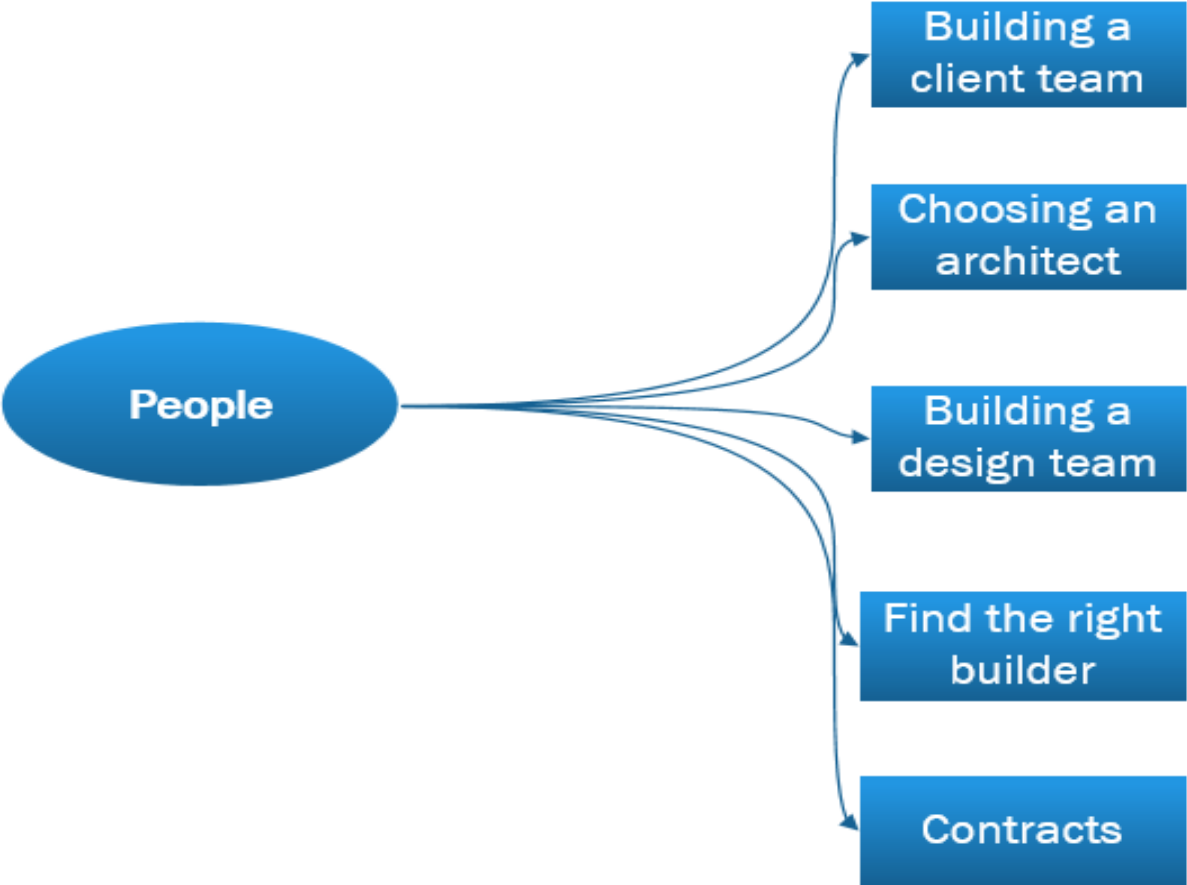




CHURCH BUILDING PROJECTS



Purpose
Planning
Procurement



Principles
Partnerships
People
Processes
Steps on the way
Finance



Building a client team

- ☐ Chair
- ☐ Finance
- ☐ Communications
- ☐ Prayer & Mission
- ☐ Employer's Agent
- ☐ Community
- ☐ Administrator
- ☐ Project Manager



Handouts





Other essential roles

- ☐ Health & Safety
- ☐ Point of contact for professionals, builders etc





Group share

Share

How to find the volunteers

Worth a try: <https://do-it.org/>
<http://www.nottinghamcvs.co.uk/>
www.ashfieldvoluntaryaction.org.uk
www.bcv.org.uk
www.caplus.org.uk
www.mansfieldcvs.org
www.nandscvs.org
www.rushcliffecvs.org.uk
www.vcb.org.uk

Best of all: Community engagement and networking



Choosing an architect

Obvious things

- ✓ Technical skills
- ✓ Ability to manage
- ✓ Relevant experience/accreditation
- ✓ Practice of the right size

Not so obvious things

- ✓ Good relationship
- ✓ Imagination
- ✓ Keep to scope
- ✓ Good value
- ✓ Dialogue for design to achieve mission objectives

How to find one: depends on size of project, may be special requirements from funder

Handouts

26-27

Of course, good procurement disposal is an essential part of

But funnily enough that isn't defining what you need.

Scoping

Really, really, need. And then going back to purpose. In project as in many others: clarity of purpose or object that is the essential four procurement. Defining sometimes called defining scoping.

It is then much easier sometimes seems a bit to decide later whether 'scope' (project-specific 'superfluous'). Good possible.

But scoping is not being sought.

Scoping people

To get to a design define the need project there at someone who set of drawing presenter, with

Shortlisting

Once you have through a process the next step

Tendering

For people respond to interview

For work works

Choosing an Architect



The architect is usually your first professional appointment. Aside from the obvious work of designing the building, the Architect has an important role in helping the client define their brief, in providing the church with the means to spread their vision for the project, and to advise on the appointment of the professional team.

What Are You Shopping For?

Being clear about what you are buying is crucial, and primarily that is not a technical service but a pivotal strategic relationship through and around which the rest of the project will revolve. The core skill of an architect – the technical part of designing a building and translating that design for a builder to build – should be a given. Once you are satisfied that your shortlist is technically competent, what you are really trying to decide is what each of these people would be like to work with. Trust and personality fit are very important. You should think of your Architect as your 'critical friend'.

Experience

It takes a long time to become a competent architect, because the role involves such a broad range of skills. The ideal is to find someone who has been practising long enough to anticipate the pitfalls on the journey, while being young enough (or young enough of mind) to bring energy and imagination to the design. It is certainly good to ask to see examples of similar work, but the danger here is that you will get a 'Blue Peter' solution ('Here's one I prepared earlier'); for that reason, a designer's best building is sometimes the first one they do of that type. Think too about the type of project – new buildings are relatively simple (I) and have much in common across building types, but if your church is a historic one then you most definitely need a designer who respects old buildings and is skilled in combining old and new.

Size Matters

Architects' practices come in many shapes and sizes, with lots of architects working on their own or with one or two others. At this end of the profession an individual may well have the skills to take on large projects, but you need to understand how available they will be, and what happens if they fall ill. With larger practices (say over 12) it is not uncommon to 'buy' the partner or director at interview, only to find all your dealings are with the office junior. Practices of 3-12 often combine the best of both worlds, the benefits of larger practice with the approachability of small practice – 'big enough to cope, small enough to care'.

Don't be afraid to ask how each practice is structured, who reports to whom etc, because that feeds through into who you end up dealing with and how. The other related issues are what the purpose and vision and mission of each practice is (a look of stunned surprise?), and even what the succession plan is – it is important that you can be confident that the practice you buy into now will still be around in 5-10 years' time, because your project is likely to take that long to come to fruition.

Cost

You need to understand the costs, but do not make this the sole criterion for selection. Why? Because you should not underestimate the power of design, whether good or bad – the potential value created (or missed out on) far exceeds the cost paid in fees. You should therefore look at value, not just cost.

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Handouts

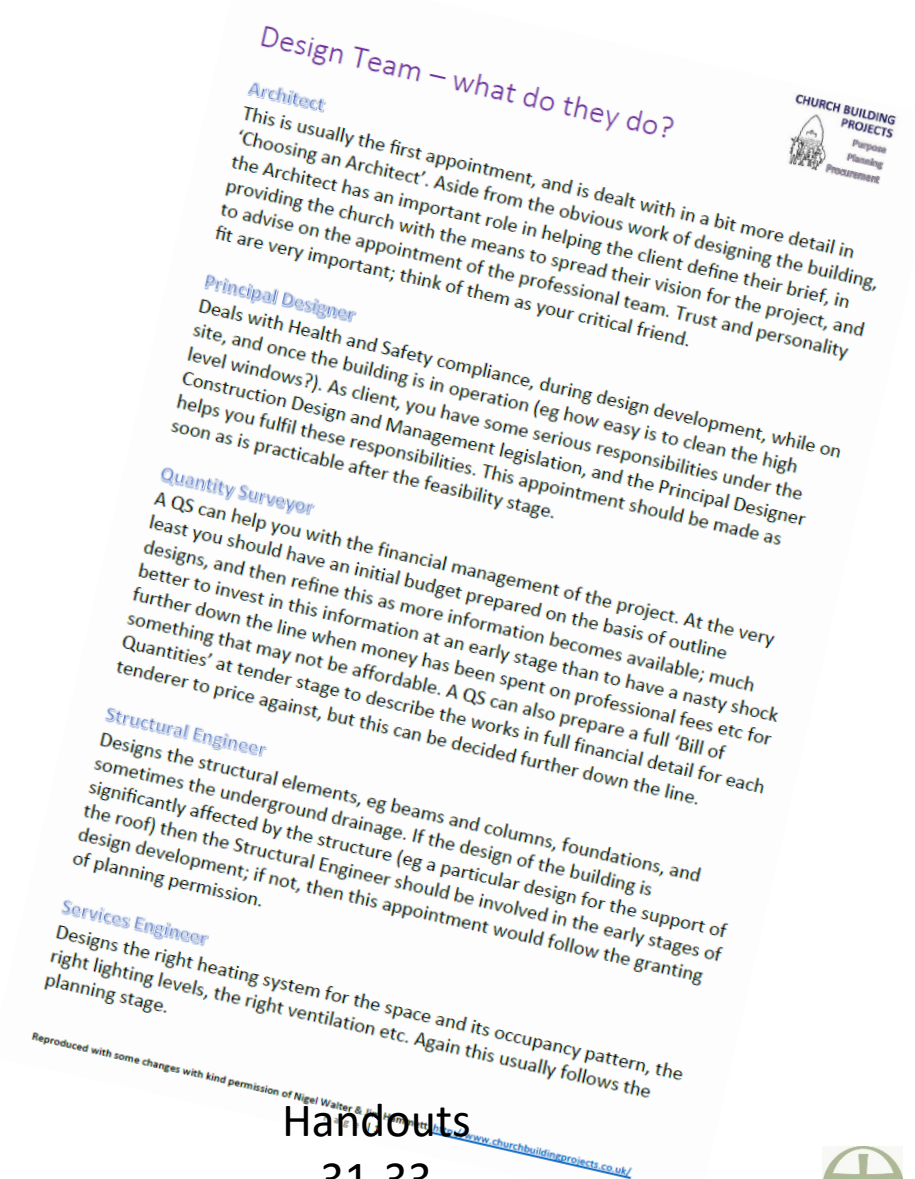
Page | 1

28-30



Building a design team

- Basics: Architect, Principal Designer (CDM REGULATIONS 2015), Quantity Surveyor, Structural engineer, Services Engineer, Building inspector, builder
- Possibles: Project Manager (if architect not doing it), planning/heritage consultant, party wall surveyor, AV engineer, lighting designer, kitchen designer



Handouts

31-33



Find the right principal contractor

- ❑ Use design team to make a tender list
- ❑ Seek references for similar work
- ❑ Due diligence (finance, labour, reference sites)
- ❑ Health & Safety plan incl. Construction Phase Plan
- ❑ Point of contact

www.citb.co.uk/cdmregs

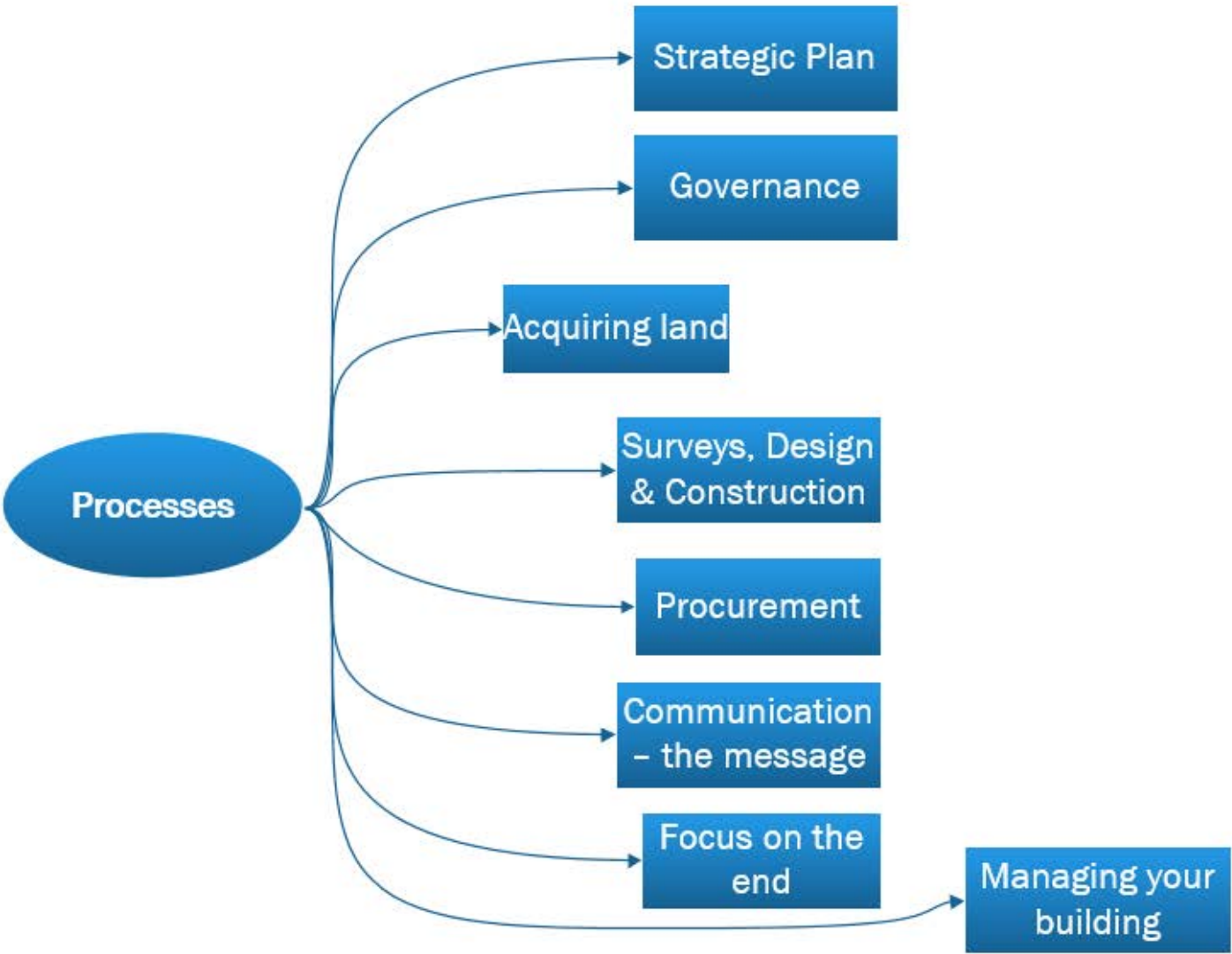




CHURCH BUILDING
PROJECTS



Purpose
Planning
Procurement

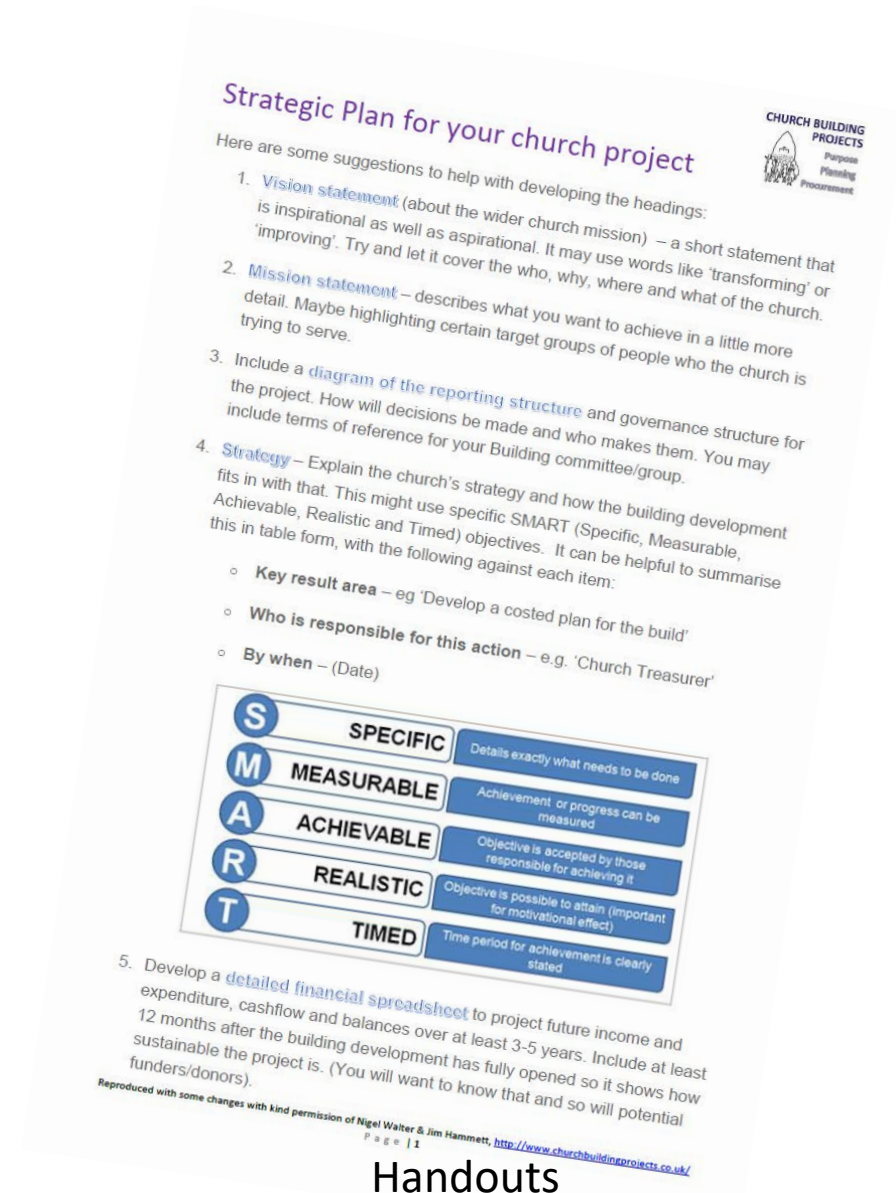


- Principles
- Partnerships
- People
- Processes**
- Steps on the way
- Finance



Strategic Plan

- Vision statement
- Mission statement
- Governance and reporting
- SMART objectives
- 3-5 year financial plan
- Marketing plan
- Review mechanism



Handouts

37-38





Governance

- Risk Management
- Where are all the documents everything kept?
- Think about your structure – are trustees (PCC members) protected?
- Will you be having new staff on the premises when the build's complete?
- Are you going to be trading?
- How about VAT?

Free tools for organising and sharing online:

Meetings

- www.doodle.com

Documents

- www.dropbox.com
- www.google.co.uk/docs/
- <https://wetransfer.com/>





Acquiring Land

- Location
- Planning Permission
- Valuation
- Ownership





The groundwork: Surveys, Design & Construction

Luke 14, 28-30

28 “If you wanted to build a building, you would first sit down and decide how much it would cost. You must see if you have enough money to finish the job. 29 If you don’t do that, you might begin the work, but you would not be able to finish. And if you could not finish it, everyone would laugh at you. 30 They would say, ‘This man began to build, but he was not able to finish.’





Surveys, Design & Construction

- Check who owns what
- Are buildings* listed?
- Is the church in a conservation area ?
- Are there any scheduled ancient monuments ?
- Are there any individual tree preservation orders ?
- Measured surveys; ground investigation; unmarked burials; archaeology;
- Contamination (including asbestos)
- Bat survey
- Available capacity of utilities (drains, gas, electricity)





Surveys, Design & Construction

THE CHURCH OF ENGLAND Church Heritage Record

Home | Sign In | Register | Church Search | Site Map

Search the site

Home Applications Churches Contact Help

Welcome to the Church Heritage Record

The Church Heritage Record contains over 16,000 entries on church buildings in England covering a wide variety of topics including architectural history, archaeology, art history and the surrounding natural environment. It is continuously being updated and should not be regarded as complete - [find out more](#).

Search for your church by name and click on the red symbol in the map to access its record. Or find groups of buildings by clicking "Find a set of Churches". You may also be interested in this [map of renewable energy use in our churches](#).

Find a church

Church name: Church code:

OR: Find a set of churches

Placename, postcode or grid ref Search

50 m

To zoom into an area hold the SHIFT key down then click and drag a rectangle.

Site Map | Privacy | T & C | © 2014 - 2017 Archbishops' Council | Web site by exeGest SDM | Rev. 2.2.6337.16670

https://facultyonline.churchofengland.org/FAS/Form8/Form8.aspx?id=933#Ap 90%

1 2 3

An area to upload documents produced e.g. survey/excavation reports [Edit](#)

Please upload heritage-type documents that were produced as part of the Faculty. This could include:

- Heritage statements
- Archaeological reports
- Conservation reports of buildings or objects
- Plans & photographs

The information you upload will be stored in the [Church Heritage Record](#)

Document Title: Please write the full title of the report.

Year/Date: Year only

Originator: Please write the name of the Author (full name: First, Initial, Surname), Organisation, Archaeological Unit, Architectural Firm, etc.

Copyright: Who owns the copyright to this document? If you are uncertain, write the name of the report's author(s)/organisation.

Description: Summarise the report's content and conclusions.

Document: Click browse to upload the file.

Document title:

Year / Date:

Originator:

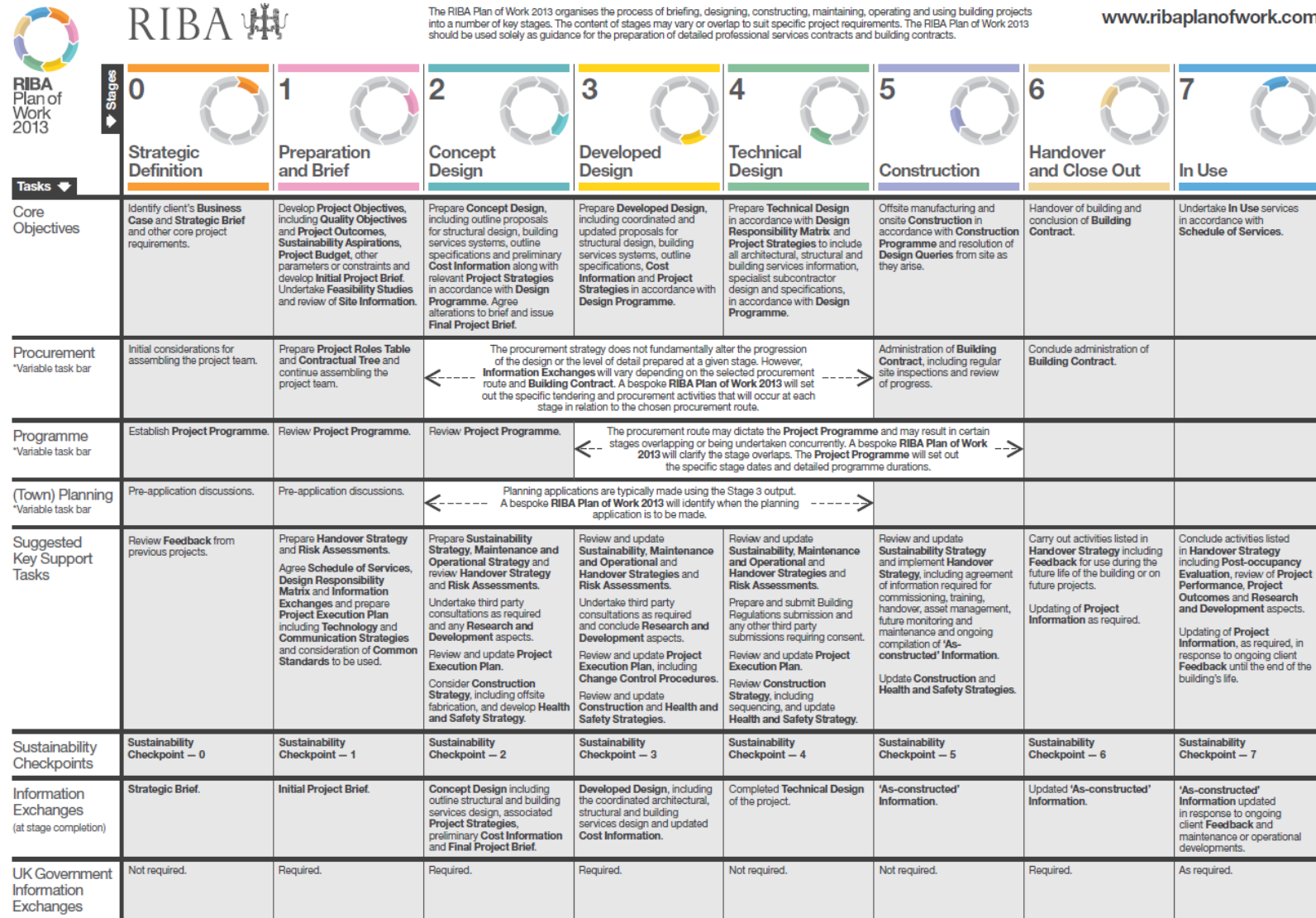
Copyright:

Description:

<https://facultyonline.churchofengland.org/churches>



Project route map: 8 RIBA stages, 0-7



So What Are The Stages?

The system comprises 8 stages, numbered from 0-7 (1). Briefly, this is what each entails:

- **Stage 0 – Strategic Definition:** This is the stage when you're deciding whether or not you have a project at all – it may involve a feasibility study to explore whether a building project is a good idea, and if so what the possibilities are.
- **Stage 1 – Preparation and Brief:** Here you decide what you hope the project will achieve (the 'Brief' part), and commission any surveys, for example of an existing building or piece of land (the 'Preparation' part).
- **Stage 2 – Concept Design:** Here you start seeing some proposals, initially in sketchy form, and later with more formal drawings. At the end of this stage you will have decided what product it is they are trying to buy – how big the building is, what it looks like, and what you will be able to do with it.
- **Stage 3 – Developed Design:** The design is developed further and a planning application is submitted.
- **Stage 4 – Technical Design:** At this stage other members of the design team input and co-ordinate design information – for example the structural and services design.
- **Stage 5 – Construction:** The contractor gets ready to begin work and then builds the building;
- **Stage 6 – Handover and Close Out:** The builder hands the completed building over and after a period (typically a year) any subsequent defects related to the building work are addressed, and the building contract is concluded.
- **Stage 7 – In Use:** This allows for post-occupancy evaluation and review of whether the project achieved what it set out to.

Comments

The programme shown is for a substantial project with typical timings assuming a fair wind; sometimes the stages may become more drawn out – for example there may be a pause while sufficient funds are raised to be confident making a start with the building work.

Adapted from www.churchbuildingprojects.co.uk with kind permission of Nigel Walter & Jim Hammett

Handouts
39-41



Procurement – the stages

- Scoping
- Supplier selection
 - Shortlisting & research
 - Supplier selection
- Pricing and terms
- Contracting



Procurement

Of course, good procurement is part of good stewardship. Making good use of the resources at our disposal is an essential part of being good stewards.

But funny enough that isn't about the buying or pricing or getting proposal. The first step is about defining what you need.

Scoping

Really, really, need. And that means going back to purpose. In a building project, it's about defining the purpose, the clarity of the need, the scope of the project that is the essential foundation of good procurement. Defining need is sometimes called 'scoping'.

It is then much easier (even though it sometimes seems a bit of a shame) to decide later whether something is 'out of scope' (project-speak for 'unnecessary' or 'superfluous'). Good stewardship starts with defining the scope in a way which makes that discipline possible.

But scoping is not a cold exercise, it also, crucially, includes the qualities of the good or service which is being sought.

Scoping people

To get to a design, even if you are going to define the need, the scope of the service project there are several important people you need to have someone who looks at your need and set of drawings and a specification, a presenter, with suitable skills and experience.

Shortlisting

Once you have agreed that scope through a process of shortlisting the next stage.

Tendering

For people: the scope also respond to this scope for interview, with presenters.

For work: this will be works specification.



Contracts

Design Team

A building project involves a series of relationships with a variety of professionals. In most cases each relationship will involve paying fees in return for a service, which in each case will mean that you will enter some form of contract. These contracts can be as simple as an exchange of letters, or they may use a more thorough standard form, depending on the extent of the input required; for example an architect's appointment commonly uses the RIBA Standard Form of Agreement.

It is down to the two parties to agree the basis on which you pay different members of the design team. There are many ways this can be done, for example:

Lump Sum: Where the scope of the work required is well-defined a lump sum may be appropriate;

Percentage of construction cost: is an arrangement that flexes with the size of the project. A building project should be a creative and exploratory process; as such it is not possible at the beginning to foresee the end result in any detail, and it is therefore not possible to predict accurately how much work is involved. This is where a percentage fee may be appropriate.

Time charge: The meter is running and, as with a taxi ride, you simply pay for the time it takes. This can be good for more minor aspects where the work is carried out on an ad hoc basis; it also puts the onus on you as the client to be organised.

The basis for payment is one important item for discussion when interviewing. As an initial rough guide, fees for professional services are typically 10% overall for your professional costs for a new building project. Fees will be higher on work to existing buildings, because there are more decisions to be made here than in designing a new building. For work to existing buildings there is still more to think about and co-ordinate, and more time to liaise with and get approval.

Handouts

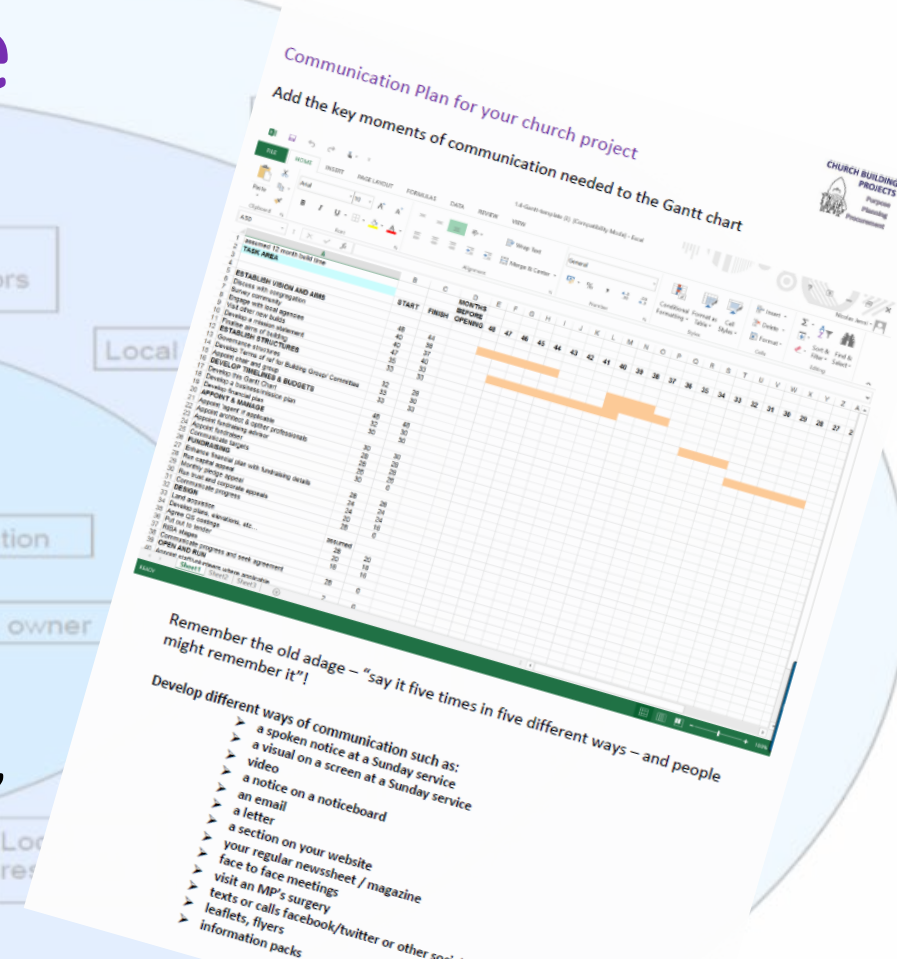
42-43



Stakeholder map:
Design your own
How will each group be
involved or informed
about the project?

Communication – the message

- Stakeholder map is key
- At least 12 different ways to communicate
- Say it lots of times in lots of different way
- Poor communication = loss of momentum, enthusiasm



Handouts
44-45



Focus on the end

- Plan the opening/rededication day
- Managing and staffing the new building
- Develop operating policy
- Planning and monitoring finances
- Keeping the vision
- Lessons learnt



Handouts

47-50



Managing your building

- Asset management plan, including budget
- Regular Maintenance
- Quinquennial inspection
- Capital repairs

EXAMPLE ASSET MANAGEMENT PLAN (AMP)

By combining real tasks and costs of Regular Maintenance with projected tasks and costs of Capital Repairs, Improvements & New Works, the AMP produces annual and long term budgets for the building, enabling both preventative maintenance and saving for large capital items

for large capital items	KNOWN CYCLE	COST per CYCLE	ANNUAL COST	Year Intervals									COST over 30 YEARS
				2	5	10	15	20	25	30	other		
REGULAR MAINTENANCE													
Clean Gutters and Downpipes	3 months	200	800									24,000	
Clean Gullies and drains	3 months	50	200									6,000	
Boiler Service	annual	200	200									6,000	
Ventilation Service	annual	200	200									6,000	
Portable Electric Appliances Test	annual	125	125									3,750	
Vermin and Rodent Control	3 months	70	280									8,400	
Cleaning window glass	2 yr	500	250	*								7,500	
Lightning Conductor Test	2 yr	100	50	*								1,500	
Fire Extinguisher Test/replacement	annual	150	150									4,500	
Electrical Installation Test	5 yr	3,000	600	*	*	*	*	*	*	*		18,000	
Painting Exterior metal/wood	5 yr	5,000	1,000	*	*	*	*	*	*	*		30,000	
Churchyard Grass-mower service, fuel	annual	300	300									9,000	
Churchyard Landscape/Trees	annual	500	500									15,000	
Churchyard walls pointing & clear ivy	5 yr	1,000	200	*	*	*	*	*	*	*		6,000	
Repointing Various Areas	2 yr	3,000	1,500	*								45,000	
Total			6,355									190,650	

CAPITAL REPAIRS				When work will be required										
Churchyard Paths	10 yr	5,000	500		*		*			*				15,000
Felt roofs to boiler roof and organ loft	20 yr	10,000	666			*					*			20,000
Repair/replace window feramenta	as & when	3,000	300			*		*			*			9,000
North Aisle Mullions	100+ yr	25,000	834				*							25,000
Pinnacles to tower	100+ yr	60,000	2,000					*						60,000
High Level Internal Cleaning	10 yr	3,000	300		*		*		*					9,000
Lead Roofs patch repair	10 yr	3,000	300			*		*		*				9,000
Lead roof replace (100 years old)	150 yr	150,000	3,000									50		90,000
Electric Lighting upgrade	25 yr	25,000	833							*				25,000
Electric Power upgrade	25yr	15,000	500							*				15,000
Heating & Boiler upgrade	25 yr	35,000	1,166							*				35,000
Kitchen & Toilets upgrade	15 yr	12,000	800				*			*				24,000
Ventilation System Replace	20 yr	18,000	600					*						18,000
Total			11,799											354,000

IMPROVEMENTS & NEW WORKS				Project Target Completion										
Fire Alarm & Emergency lights install	one off	18,000	3,600		*									
Re-ordering, new rooms & office	one off	130,000	13,000			*								
New Mower	one off	500	100		*									
Total			16,700											

AMP annual total (£) to be raised: **34,854**

Handouts

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<http://www.parishresources.org.uk/wp-content/uploads/Asset-Management-Plan.xls>





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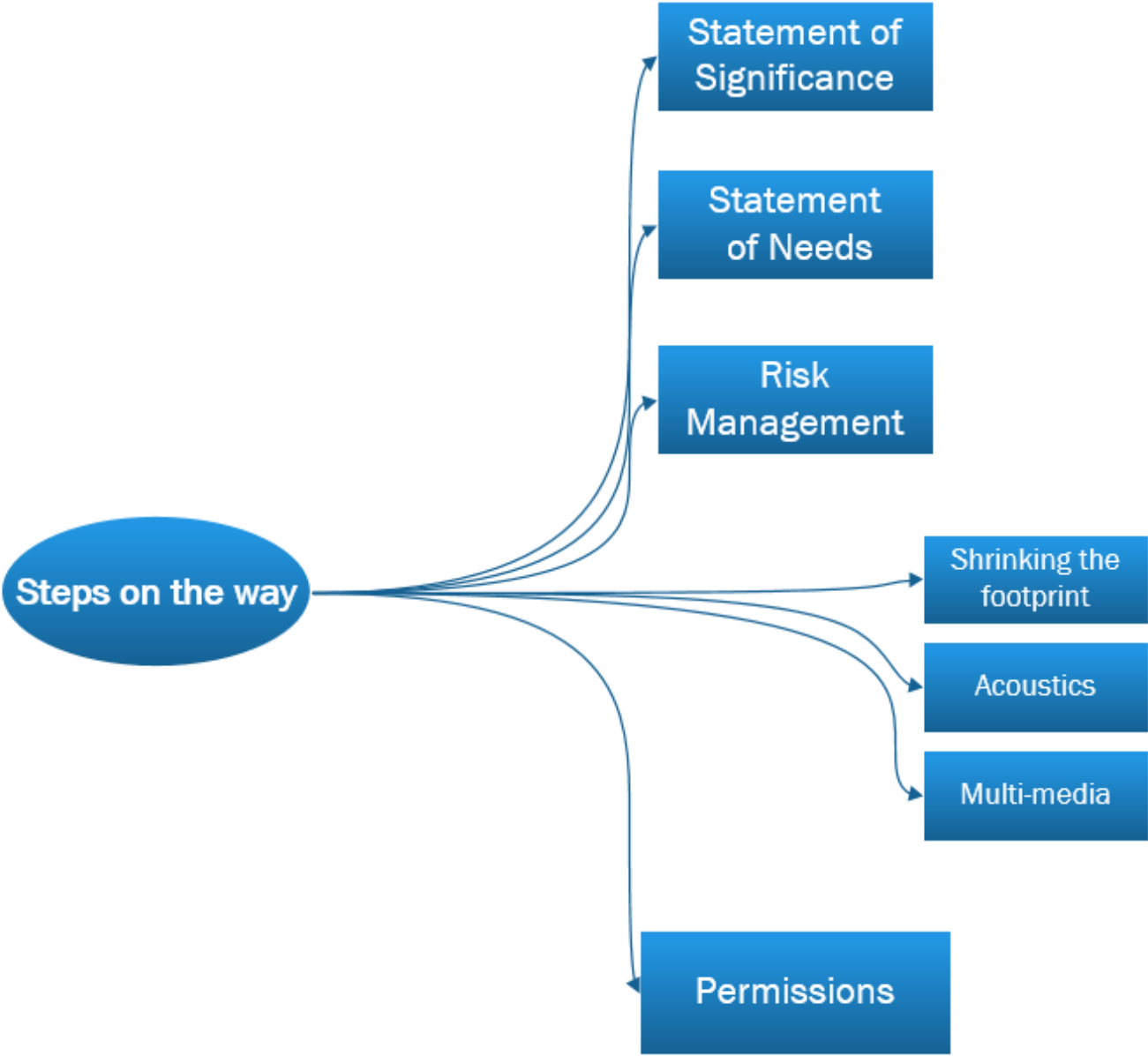




CHURCH BUILDING
PROJECTS



Purpose
Planning
Procurement



- Principles
- Partnerships
- People
- Processes
- Steps on the way
- Finance



Statement of Significance

- Applies to listed churches and churches within conservation area – check with your DAC. Useful in all cases.
- History, evolution and description of the building, and place in the community

Statement of Significance

Guidance on completing this form can be found on the ChurchCare website at <http://www.churchcare.co.uk/churches/guidance-advice/statements-of-significance-need>

This document must be accompanied by the Standard Information Form 1A

Section 1: Brief history and description of the church building(s), contents, churchyard and setting

Section 2: The significance of the church (including its contents and churchyard) in terms of:

- i) Its special architectural and historical interest
- ii) Any significant features of artistic or archaeological interest

Please state if you have taken expert advice to help you define the significance, and from whom.

Handouts
52-56





Contact Us >

ABOUT US

CHURCHES

CATHEDRALS

SHRINKING THE FOOTPRINT

SUPPORT US

Supporting over 16,000 cathedral and church buildings of The Church of England

Statements of Significance and Need

Home

Faculty Rules 2015

Funding and Grants

Guidance and Advice

Looking after Your Church

Making Changes

Opening Up Your Building

> Statements of Significance and Need

All Guidance Notes

Clergy Training - Getting the Best Out of
Your Building

Art, Artefacts & Conservation

Open and Sustainable

Closed and Closing

News and Campaigns

Church Buildings Council

Advertising for Professionals

100 Church Treasures

Heritage at Risk

Online Faculty System

ChurchCare has received feedback that a simplified form for the compilation of Statements of Significance and Needs for most works would be welcome, this is available by clicking [here](#). **Guidance on completing the form is available [here](#).** For major complex projects, i.e. the type of project which would normally require the compilation of a Conservation Management Plan (see below), an expanded version of the form should be used. This can be accessed by clicking [here](#). Guidance on completing an expanded form is available [here](#).

The Council would strongly urge that these documents are prepared at an early stage of the faculty process so as to help inform decisions and identify areas of conflict.

Click here to see how the [Church Development Plan](#) shows you how these fit into the process. However, you do not need to have a scheme in mind for Statements to be useful, as they will help you understand the potential and constraints of your building and site.

Conservation Management Plans

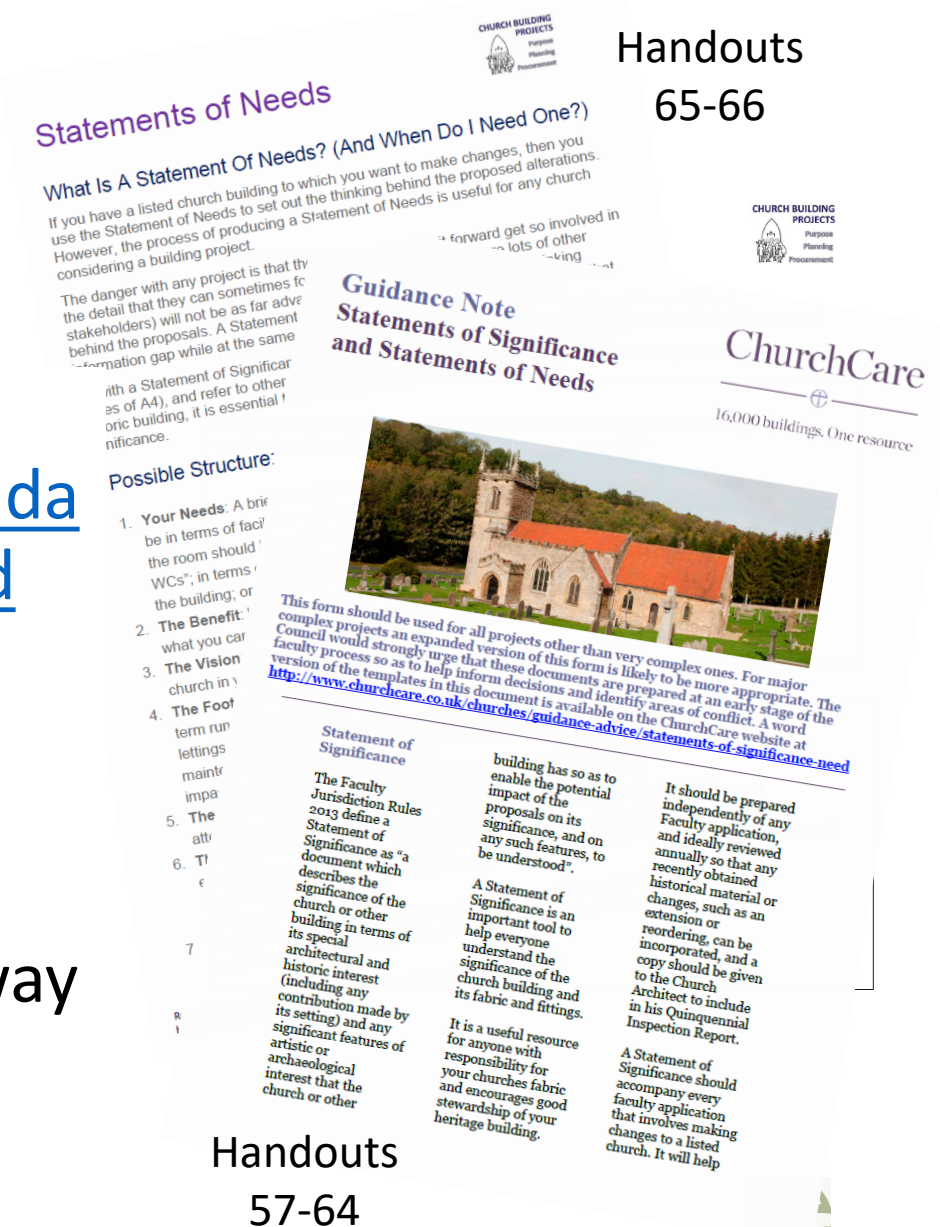
Some major churches are of such complexity and significance, or the impact of the project so large and/or controversial, that Statements of Significance and Needs may not be sufficient.

Where this is the case, the PCC or other body responsible for a church should consider producing a [Conservation Management Plan](#). Click the



Statement of Needs

- Good advice on available on <http://www.churchcare.co.uk/churches/guidance-advice/statements-of-significance-need>
- Explain proposed changes to others
- Gives needs, benefits, vision, cost, timing, context and history
- Explains why need can be met only in the way proposed



Risk Management

- Governance
- Strategic Fit
- Fundraising and income generation
- Legals & Contractual
- Programme/Timings
- Commercial risks (inflation/procurement)
- Financial issues (e.g. VAT, contingency)



Risk Management

This isn't a section to scare you. This is about trying to identify the things that might go wrong, and taking sensible steps to reduce the chances of their happening. It is not about eliminating risk: who, after all, really wants to wear a belt and braces?

Consider whether you give one person the role of devil's advocate (constructively!) to try and identify weaknesses and find ways to overcoming them. So here are where some of these risks may arise, and what you can do about them:

Governance
Much of what you will be doing during the period leading up to and including a building project, and afterwards, will be unfamiliar. If you try and muddle along without accepting that you have to make some special roles and responsibilities clear, and be careful in choosing the right people for your team, you run the risk of suffering some major impacts on your church.

Strategic Fit
Here we're talking about the strategic fit of your building project – does it respond to the mission purpose(s), and have the mission purpose(s) been well founded?

Fundraising and income generation
There are some obvious and less obvious risks in this section – matching fundraising to the scope of the building project – and the reverse – is the most obvious one, but also its effect on operating income.

Legal and contractual
Careful scoping, shortlisting, supplier selection and clarity of contract are all components in mitigating this risk


Programme/timings
Are there some dependencies which might trip you up? A building project has lots of operations where one cannot start until a previous one is complete. Or a tenant cannot start until the building is open.

Commercial risks (inflation, procurement)
Will costs vary against the estimate and what you fund-raised? Are your suppliers in good financial health?

Financial issues (e.g. VAT, contingency)
Try and avoid surprises but plan for some!

Handouts
67-68

CHURCH BUILDING PROJECTS
Purpose
Planning
Procurement



Three important topics

Shrinking the footprint

Building form, Orientation, Construction, insulation
Photovoltaic cells, Heat pumps, Bio-mass, Rainwater
harvesting

<http://www.churchcare.co.uk/shrinking-the-footprint>

<http://www.london.anglican.org/kb/sustainable-building/>

Acoustics

Effect of new build, Reorganisation of space,
Amplification for music or speech, Furnishings, carpeting,
Separate spaces

Multi-media

Location of sound-desk, Flexibility, WiFi, Induction loop,
Simple to control, Screens



Handouts
69-77





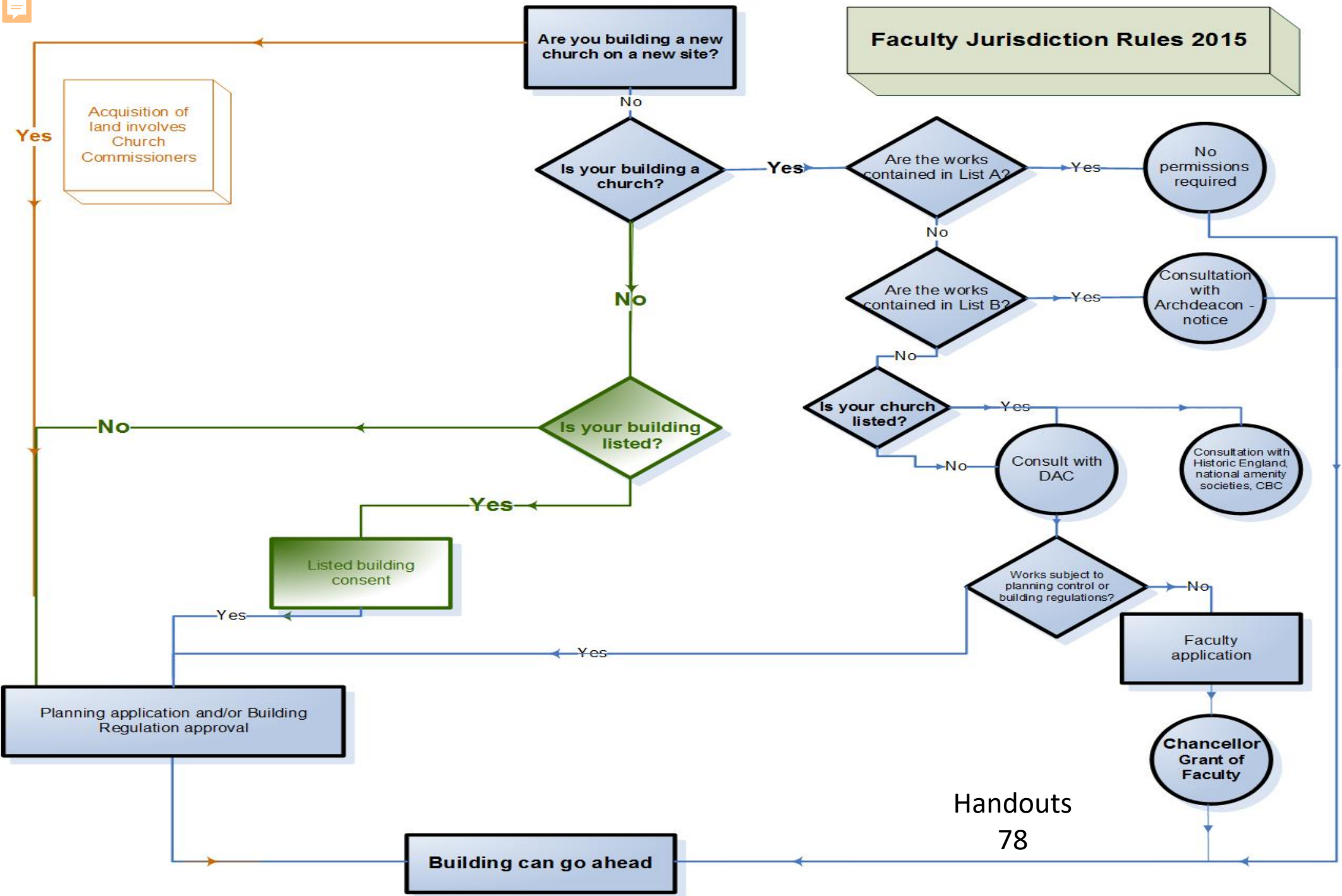
Faculty Jurisdiction Rules 2015

Diocesan Advisory Committee (DAC)

The DAC is required to advise on all faculty applications, and will be available to advise on all matters relating to the project and to the application before it is submitted.

Archdeacon will consult with DAC

The Chancellor's decision on the Faculty application will be based on the advice of the DAC and others, and any other representations during 28-day public notice

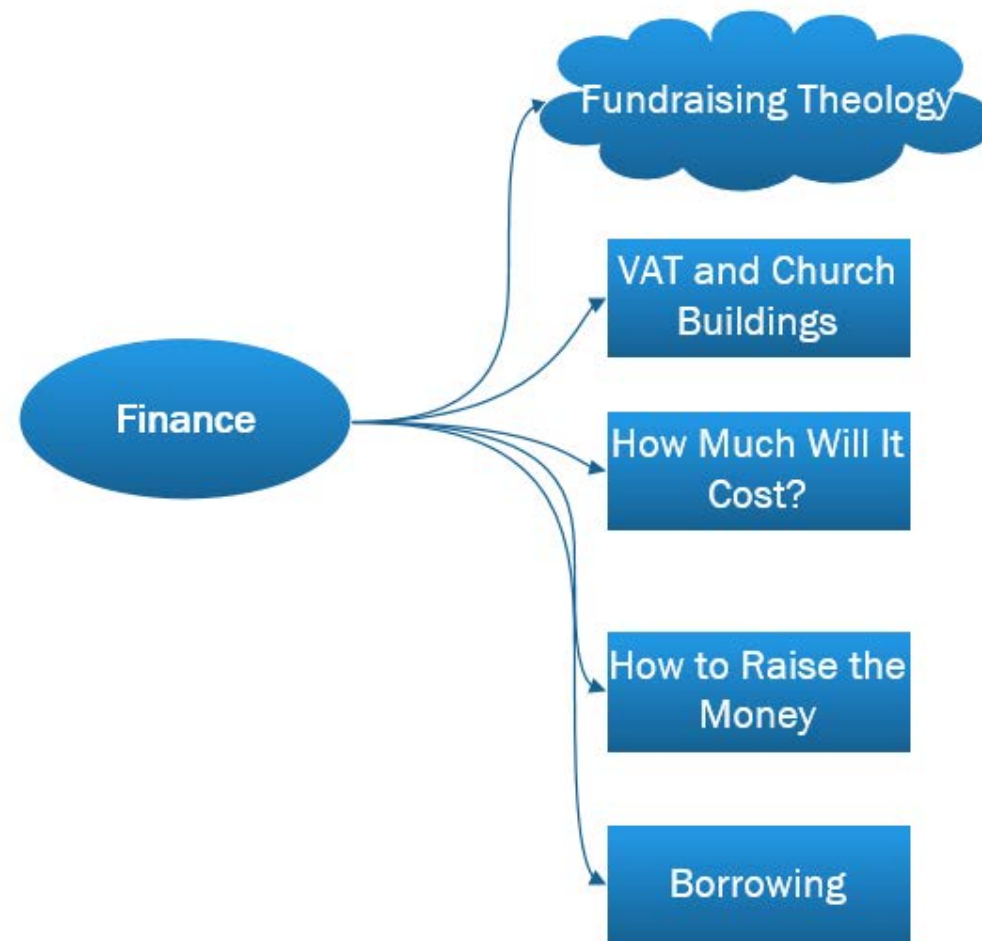




CHURCH BUILDING PROJECTS

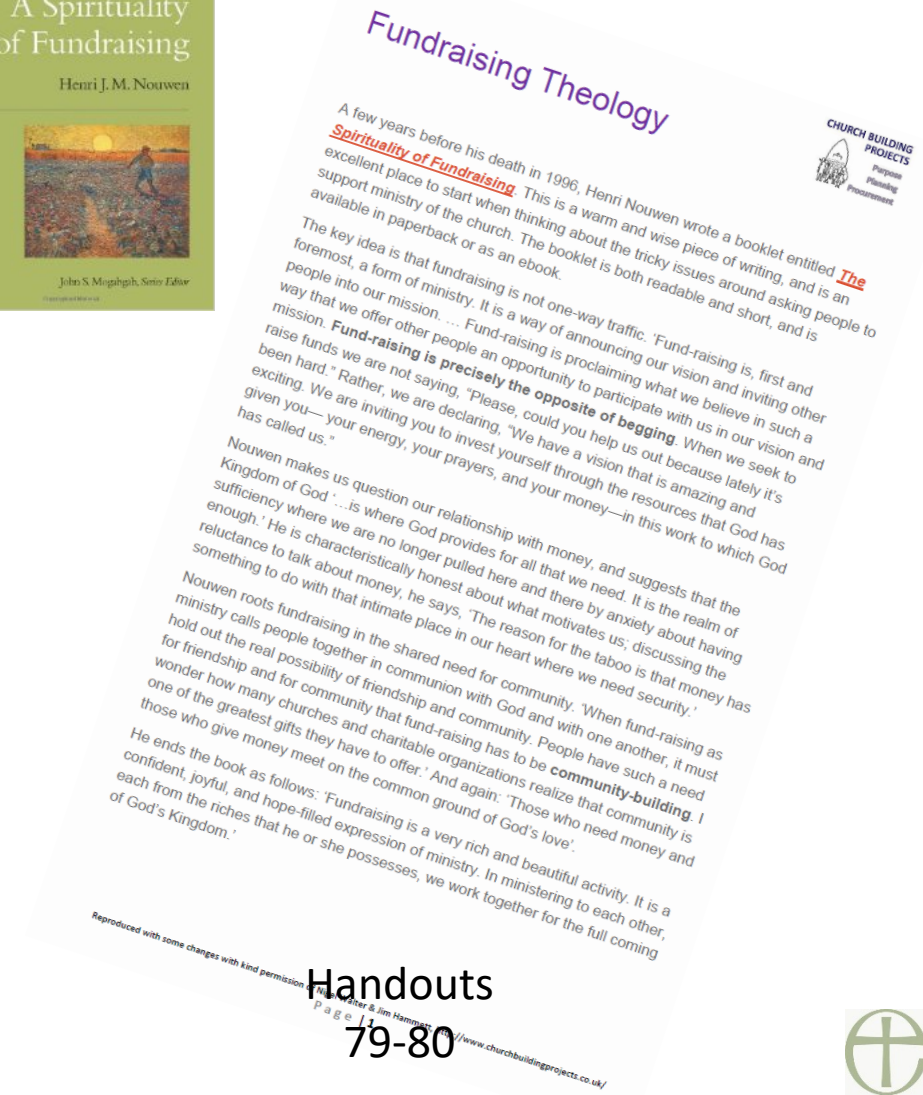
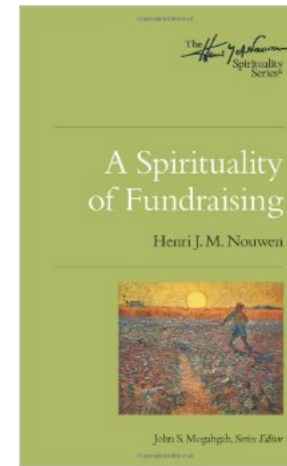


Purpose
Planning
Procurement



Fundraising

- Form of ministry
- Sharing of vision
- Shared need for community
- Opposite of begging



How to Raise the Money

Parish Resources



A FRIENDS' SCHEME FOR A PARISH CHURCH

By Susan Rennison revised

Reproduced from a version developed by the Church of England's National Stewardship & Resources team

Contents

1. Introduction
2. Formation of a 'Friends' Scheme'
3. Terms of Reference
4. Membership
5. Services to Members
6. Services by the Friends
7. Types of Schemes
8. Setting up a 'Friends' Scheme'
9. Subscriptions
10. Gift Aid
11. Parish as a Charity

Appendix 1: A Constitution (this is a template)

With the increasing costs of repairs and the need for a group of people help to share the responsibility of raising the money to hand on to the next generation.

Many people have a great deal of experience in raising money for their parish church can encourage them to do so.

For more information on how to set up a Friends' Scheme, please contact us.

© The Archbishops Council

How to Raise the Money

Church projects will usually be funded from a variety of sources. Please have a look at Parish Resources <http://www.parishresources.org.uk/>.



My colleague Eleanor Gill runs workshops when requested by dioceses and has published a guide to raising money for church buildings here - <http://www.parishresources.org.uk/resources-for->
She also runs workshops on legacies and there is a section on what you could be doing in your parish here <http://www.parishresources.org.uk/legacies/>. This potential long-term funding may not fund next week's project, but in the longer term is a source of funding which needs attention.

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- Internal: Capital Appeal, Congregational Pledges, Sponsored events, online
- External: Grants, Trusts & Foundations, Commercial Giving, **S106 Money**, National Lottery,
- Borrowing: Internal, community, Diocese, stakeholders, commercial
- Forward plan to avoid surprises (e.g. joint project with Methodists means no HLF)
- <http://www.parishresources.org.uk/resources-for-treasurers/funding>
- <http://www.parishresources.org.uk/friends-schemes/>
- <http://www.parishresources.org.uk/legacies/>

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How to Raise the Money

Indicative Campaign Timeline (Excerpt)

Actions	J	A	S	O	N	D	J
1. Planning Phase							
2. Private Phase							
3. Public Phase							
4. Consolidation Phase							
Campaign Plan							
Internal Preperation							
PCC Meetings							
Business Plan							
Campaign Management							
Campaign Budget							
Campaign Plan development							
Chair Recruitment							
Campaign Volunteer Recruitment							
Chair Recruitment for Sub Committees							
Team Meetings							
Identifying networks & contacts							
Grant Makers Identification							
Individual donor Identification							
Internal Communications Plan							
Campaign Materials Preperation							
Private Phase Information & Events Preperation							
Donor Acknowledgement & Stewardship Planning							
Campaign Volunteer Ask Training							

- Attend 'Planning a Successful Capital Campaign' workshop
- This template available as a download

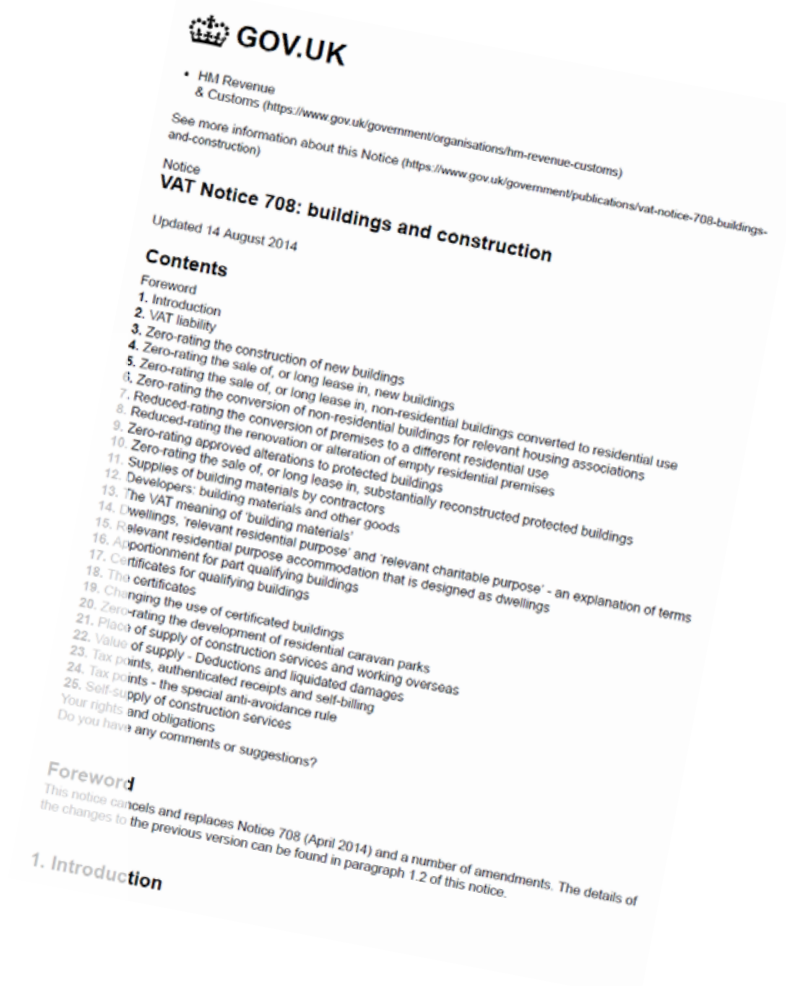
<http://www.parishresources.org.uk/resources-for-treasurers/funding/funding-guides-capital-fundraising/>



VAT and church buildings

- New church building zero-rated
- Listed Places of worship scheme
- Annexe to existing building zero rated
- Special rules for Equality Act and energy efficiency
- Subject to change

<http://www.lpwscheme.org.uk/>



VAT Notice 708/6





Summary Project CAPITAL & OPERATIONAL Budget

Template for 5 year period - 3 years before build, one year build and one year after opening

Alter this template to suit your own circumstances, adding lines and changing line names

INCOME:								
Row	Code	Description	Year - 3	Year - 2	Year - 1	Build year	Year 1	Total:
		Capital Appeal						£0.00
		Monthly donors						£0.00
		Gift Aid reclaim						£0.00
		Internal Events						£0.00
		External Trusts						£0.00
		External Corporates						£0.00
		Gifts in Kind						£0.00
		Bank interest						£0.00
		Investment interest						£0.00
		Ad Hoc events						£0.00
		Loans						£0.00
		Rental Income						£0.00
		Sales Income						£0.00
		Event Income						£0.00
								£0.00
EXPENDITURE:								
Row	Code	Description	Year - 3	Year - 2	Year - 1	Build year	Year 1	Total:
		Fundraising: Materials						£0.00
		Fundraising: Advisor						£0.00
		Fundraising: Travel						£0.00
		Fundraising: Website						£0.00
		Fundraising: Video						£0.00
		Fundraising: Events						£0.00
		Ad hoc events						£0.00
		Land purchase						£0.00
		Employer Agent						£0.00
		Professional Fees						£0.00
		Legal Fees						£0.00
		Building costs						£0.00
		Land Costs						£0.00
		Fundraising Trust Applications						£0.00
		Corporates						£0.00
		BU Loan Repayment						£0.00
		Internal Furnishing						£0.00
		Catering						£0.00
		Staff Costs						£0.00
		Maintenance						£0.00
		Utility Bills						£0.00
		Insurance						£0.00
								£0.00

Using the budget template



Having a robust system of budgeting is vital to the success of the project. That not only consists of income and expenditure but ensuring you have sufficient cashflow to pay for your project.

There is an Excel template that you can use for a 3 year period leading afterwards (to demonstrate sustainability of the template).

You may as a church want to appoint someone in addition to your church treasurer who will manage the finances of the building project in order to share the significant time required.

Do a major review of your budget at least every 2 years.

If you decide to use the helpful budget template from Churchbuild, download it from the Downloads section in Parish.

You will of course need to be familiar with Excel, which link each sheet to a specific part of the budget.

You will of course need to be familiar with Excel. Please take care not to change formula in the cells which link each sheet together.

Start by entering your opening balance (cell C19 –)

Use the Summary sheet (the one with the Summary of the project on the left) to enter the following data:

Start by entering your opening balance (cell C49 coloured in light yellow on purple tab sheet Year-3). Use the Summary sheet (light blue tab) to build your initial 5 year budgets.

Church Building Projects

Summary Project CAPITAL & OPERATIONAL Budget

*Template for 5 year period - 3 years before build, one year build and one year after opening
Use this template to suit your own circumstances, adding lines and changing line names*

Row	Code	Description	Year -3	Year -2	Year -1	Build year	Year 1	Total
		Capital Appraisal						£0.00
		Monthly Grants						£0.00
		GRT Aid packages						£0.00
		Internal Events						£0.00
		External Treasures						£0.00
		External Corporates						£0.00
		Cafes in kind						£0.00
		Bank interest						£0.00
		Investment element						£0.00
		Aid from events						£0.00
		Lenses						£0.00
		Rental Income						£0.00
		Sales Income						£0.00
		Event Income						£0.00

Row	Code	Description	EXPENDITURE:					Total
			Year -3	Year -2	Year -1	Build year	Year 1	
		Fundraising Materials						£0.00
		Fundraising Advice						£0.00
		Fundraising Travel						£0.00
		Fundraising Welfare						£0.00
		Fundraising Value						£0.00
		Fundraising Events						£0.00
		Aid from events						£0.00
		Land purchase						£0.00
		Employer Agent						£0.00
		Professional Fees						£0.00
		Legal Fees						£0.00
		Building costs						£0.00
		Land Costs						£0.00
		Fundraising Trust Applications						£0.00
		Conveyancing						£0.00
		BU Loan Repayment						£0.00
		Interest Paying						£0.00
		Catering						£0.00
		Staff Costs						£0.00
		Maintenance						£0.00
		Utility Bills						£0.00
		Insurance						£0.00
								£0.00
								£0.00
								£0.00
								£0.00
								£0.00

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<http://www.parishresources.org.uk/wp-content/uploads/Building-Budget.xls>





Break it down

- Budget for raising the funds
- Budget for the preparing phases
- Budget for all costs related to construction
- Budget for operational costs
- Consider a separate fund or trust (<http://www.parishresources.org.uk/friends-schemes/>)

for operational costs
er a separate fund or trust (<http://www.parishresources.org.uk/friends->
s/)



Objectives

- Establishing the importance of **communities engagement** in defining the **purpose and scope** of your project
- Understanding the need to **plan, organise and budget** to achieve good governance and **sustainability** after **opening**
- Accepting that good **communication** with your **stakeholders** is vital to a successful project.
- Recruiting, contracting and **procuring** the right team members, professionals and contractors is key to your success and in getting value for the funds you spend
- **Were your objectives met?**





Discussion

Time for general discussion: your questions, your comments

