

Church Building Projects: Purpose, Planning, Procurement

Diocese of York – 26 November 2018

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Acknowledgements

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Particular thanks to Nigel Walter and Jim Hammett, for the material from their excellent website <u>www.churchbuildingprojects.co.uk</u> 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 <u>www.parishresources.org.uk</u> and an email will be sent to you when it is published

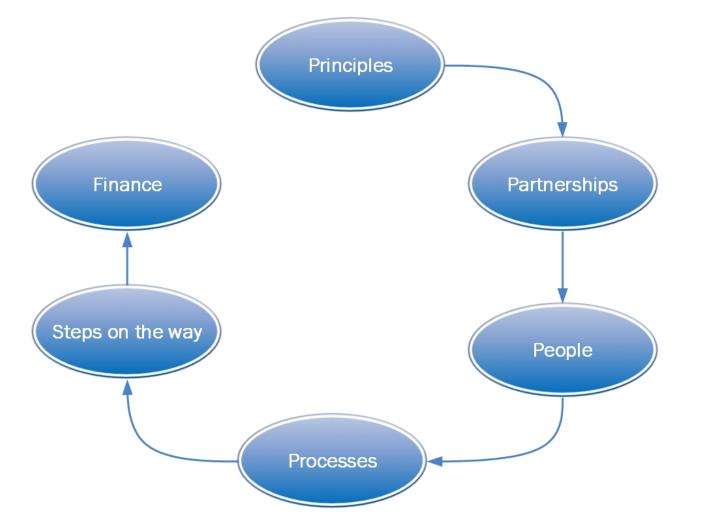




09.30 am	Registration, refreshments
10.00 am	Welcome and introductions
10.25 am	Introduction and session 1: Principles
11.10am	Break, coffee
11.30am	Session 2: Partnerships
12.15pm	Session 3: People
01.00pm	Lunch
01:45pm	Session 4: Processes
02.30pm	Session 5: Steps on the Way
03.00pm-03.15pm	Теа
03.15pm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



How to start - who owns the project – selling your project – section **CHURCH BUILDING** 106 money – in what order to do things – availability of funds fundraising flexible ways of achieving your aims – how to find labour – how to find volunteers – convincing nay-sayers – conflict management - amenity societies - choosing an architect - tips on ement planning – keeping project live – time scales – congregational tittletattle – permissions – terminology - funding stages – terms of budget delegation to building committee – solicitors – grantfinder or fundfinder - Friends Scheme - Legacies - the project manager role good communications – defining stakeholders – Friends' Scheme - mission c resources in the wider church - sources of funding sharing what other churches have done – getting value for money – moving from talking to action - team management - visiting other churches – funding for initial stage – church growth – engagement: lack of trust – transition of clergy – cross-subsidy from wealthy churches – lack of clarity

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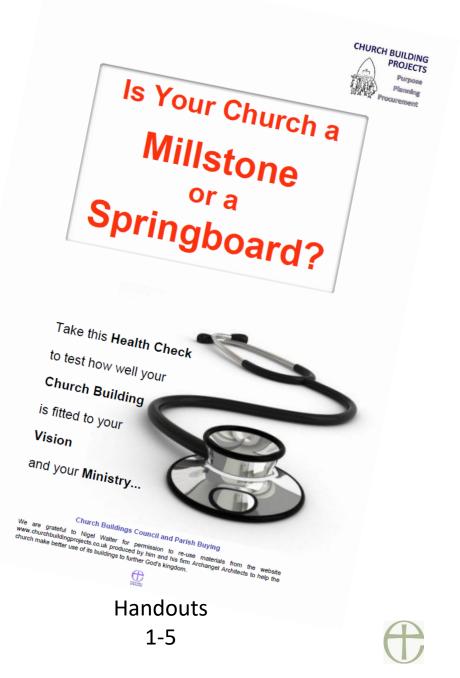


The Journey

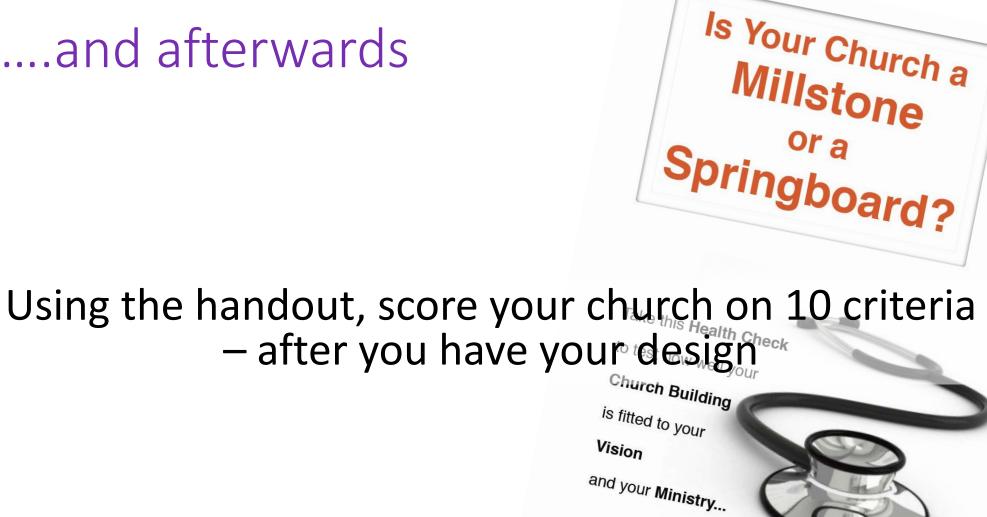
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- Preparing for change teaching
- Impact on church's ministry
- Preparing for the new
- Fundraising

www.parishresources.org.uk/buildingprojects



....and afterwards





Purpose

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

Handouts

6

after We shape our buildings, and afterwards Church Building Projects -Feeling (Dis)Connected? How dots your community set you? our buildings shape us." Winston Churchill Who thinks the church # important? Where Do You Think Where to Begin...? Are there people who feel excluded? You're Going? Who Are You, Anyway? What on Earth Do You Are there people who feel they own Do you have an overall vision of Think You're Doing? the church? what God is calling you to be and Think about how you are going to organise yourselves. What skills do you Start Here ... do to this place? Leaving building Who are you as a church, and what already have within the church, and what projects to one side, what are you are your <u>core values</u> How does what might you need to buy in from outside? hoping to achieve as a church - what you do relate to those values' What This sheet provides a playful way of Who has ultimate responsibility for 2 or 3 things make you distinctive in Is your dream? grapping with some of the serious issues decisions and how do you reach Your local community? that need to be considered before launching agreement? Which one person will be into a building project - the things you need given the authority to represent the to think about before you appoint an church within the project team? 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 How To Use matter - the key thing is to focus on the What Does This important issues, so that you can define the Success Look problem you want to address. Print this out at A3 for use by a small group -So use this sheet in whatever way suits you. Like? the central section can Doodlel Brainstorm! Make a Messi Imagine you have then be copied at A4 if completed your project, needed. Or contact us how will things be differently and we will happily How will you recognise print this for you at A1 success when you see thi How Well Do You Know size for putting up in What does a feel like? What the wall, or for a larger Your Existing Building? can you do now that you round table discussion. Do you know what you are dealing couldn't do before? 01223 474817 with? If the building has any historic mail@archangelic.com value, have you prepared a Statement of Significance? what are the known imitations? Q&A Consider archaeology, conservation, Don't worry! At this stage you don't planning, trees, legal etc. 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 Current Constraints important is to have a clear focus In what ways do your existing and a sense of purpose, so that you buildings prevent you realising your can formulate the best possible vision? Download the Springboard dilectionsor Millstone Health Check from ChurchBuild to help people explore their perceptions. This can be a great tool for hullding constnue stound the need for chinge. Where To Next...? How do you move on from here? The point of this ... scribble away! The Art of Compromise stage was to get all of the issues out onto the table You will never achieve everything you If possible into the middle space on this sheet. want, and the act of choosing helps define Out of this you can develop a formal Brief, which defines the key questions you want answered - an the point of the project - always compare architect can help you to refine and improve this. this with your vision. Other Resources The Gate of Heaven - How Church Buildings Re-Pitching the Tent, by With a Brief defined, you may then commission a Speak of God, by Nigel Walter. This booklet Richard Giles. Subttled CHURCH BUILDING With thanks to Nigel Walter and With that in mind, Church Building Feesibility Study, which would look at whether Yes Please! What are the key things to examines the principles of what is a key The definitive guide to PROJECTS Seminars - from time to the vision can be achieved within the practical Jim Hammett, for the material from relationship for any church and suggests practical re-ordering church time we help organise limitations, and give a broad indication of cost. The + Purpose means of forging a better partnership. Equally buildings for worship and their website achieve...i regional seminars for Feasibility Study may well help revise the Brief. No Thatkal What are the key things to Planning relevant whether you are struggling to maintain a mission' it does what it

avoid-1

churches - a great place to come for ideas and information. Details from www.churchbuild.co.uk

historic building, considering a substantial reordering or contemplating a new building. www.grovebooks.co.uk

says on the In. Includes appendices with good practical guidance.

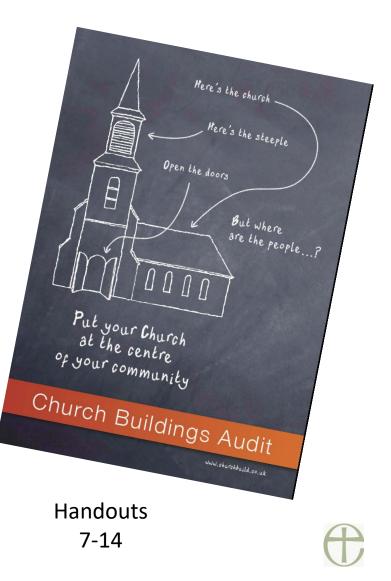
www.churchbuild.co.uk

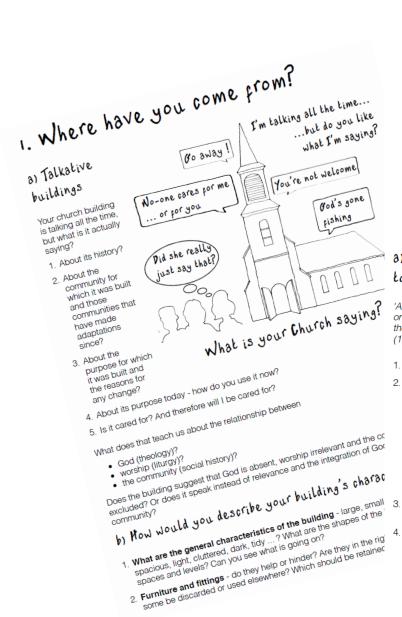
Processes

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.

Narrative: story of the building

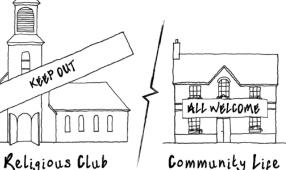
- Is your church building just a museum or work of art?
- Is you church building just a worship centre?
- Story is way people come to terms with change
- Using church building audit to build narrative





2. Where are you now?

A



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)

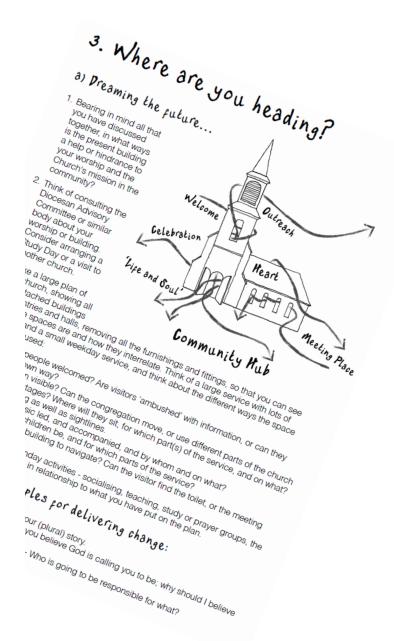
1. How does the PCC understand its 'worship and mission?

- 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
- 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?

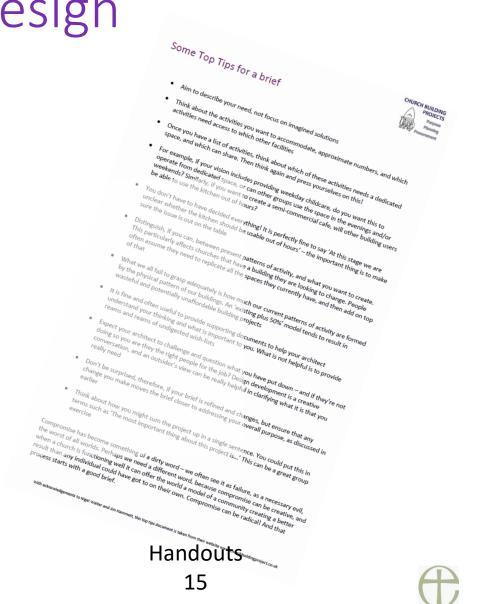


Starting the process for a design

- Question not an answer
- Needs not solutions

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- Present uses, future uses
- Collaboration is key
- Design is a response to brief





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



www.churchcare.co.uk



Home

Faculty Rules 2015 Funding and Grants Guidance and Advice Art, Artefacts & Conservation Open and Sustainable Closed and Closing News and Campaigns Church Buildings Council

Managing Church Buildings

Diocesan Advisory Committees

DAC Advisers

> DAC contact details

Diocesan Environmental Officers **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:





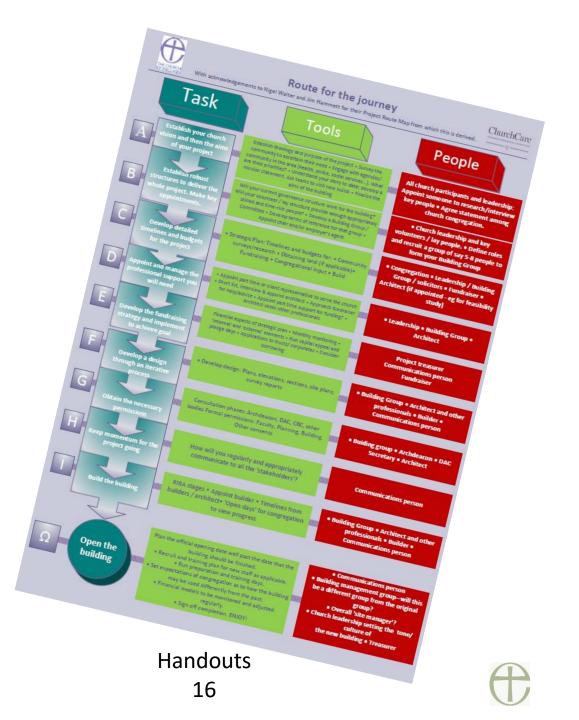






Need to plan

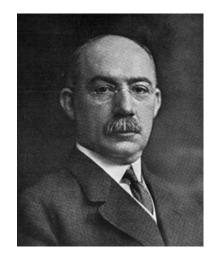
- Project route map
- Planning means a project management approach
- The time it all takes
- Grant application need to reach RIBA stage 2, other conditions
- Various ways GANTT chart



Planning - Gantt chart

• List of tasks

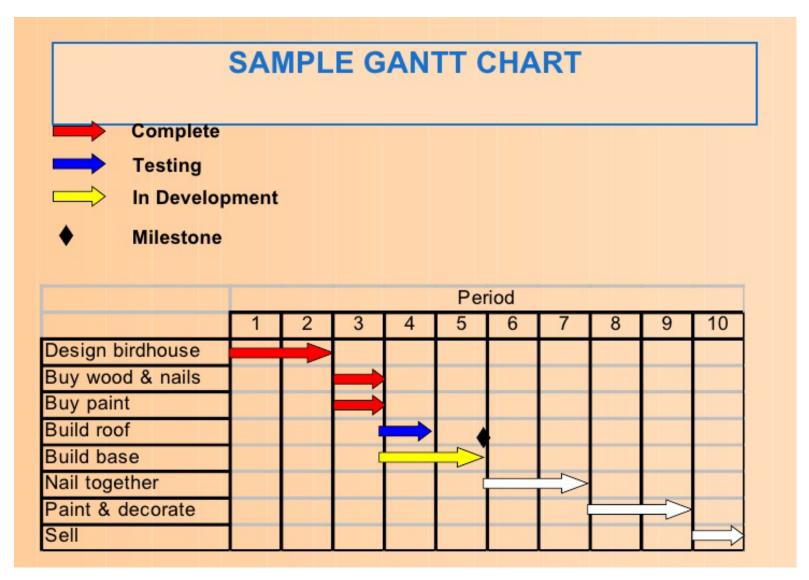
- Who has to do them
- How long each task takes
- What has to happen first
- What resources you need





Gantt chart – make a bird-table for sale

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1	assumed 12 month build time		0	MONTHS			0			0	IX.	-	IVI	IN	<u> </u>		9	IX	0	-	0	v	vv	~	-	~	-
2	TASK AREA			BEFORE																							
3		START	FINISH	OPENING	48	47	46	45	44	43	42	41	40	39	38	37	36	35	34	33	32	31	30	29	28	27	2
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5	ESTABLISH VISION AND AIMS																										
6	Discuss with congregation	48	44																								
7	Survey community	40	38																								
8	Engage with local agencies	40	37																								
	Visit other new builds	47	40																								
	Develop a mission statement	35	33																								
	Finalise aims of building	33	33																								
	ESTABLISH STRUCTURES																										
	Governance structures	32	28																								
	Develop Terms of ref for Building Group/ Committee	33	30																								
	Appoint chair and group	33	33																								
	DEVELOP TIMELINES & BUDGETS																										
17	Develop this Gantt Chart	48	48																								
	Develop a business/mission plan	32	30																								
	Develop financial plan	30	30																								
	APPOINT & MANAGE																										
	Appoint 'agent' if applicable	30	30																								
	Appoint architect & opther professionals	28	28																								
	Appoint fundraising advisor	28	28																								
	Appoint fundraiser	26	26																								
	Communicate targets	30	0																								
26	FUNDRAISING																										
27	Enhance financial plan with fundraising details	28	26																								
	Run capital appeal	24	24																								
	Monthly pledge appeal	24	24																								
	Run trust and corporate appeals	20	16																								
	Communicate progress	28	0																								
32	DESIGN																										
33	Land acquistion	assumed																									
	Develop plans, elevations, etc	28	20																								
35	Agree OS costings	20	18																								

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





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View Basket

Product	Qty	Price per Unit	Price per Media	Price per Line		Media
Microsoft Project 2016	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: <u>https://www.youtube.com/watch?v=sPwURRG9_Gs</u>





Sign up for Parish Buying and Parish Resources newsletters



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



Sign up for Parish Buying and newsletters

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National
Stewardship Team

Email List

Register your contact details below for our monthly email newsletters.

First Name: *	
Last Name: *	

Upon submitting this form, you will receive an email inviting you to register on the Parish Buying website. If you then sign up, you will receive the Parish Buying newsletter automatically and access to our nationally negotiated contracts.

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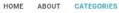
If you would also like to receive updates from other services, please click on the appropriate boxes below. You may choose more than one category:

Tick the newsletters you would like to receive:

Parish Resources Newsletter (quarterly resources for churchwardens, treasurers, PCC secretaries and incumbents)

Churchcare newsletter (the Church Building Council's Regular Message - mainly about maintenance, repairs, funding, re-ordering projects

Shrinking the Footprint newsletter (quarterly on Church's environmental campaign)





SEARCH ...

BUYING GUIDES CONTACT MY ACCOUNT

How to choose the right solution for your church

It is important to think about how you might use a contactless donations device. There is a choice of different solutions which will depend partly on how you want to use the device, and partly on how much your church can afford to pay. As time goes by there will be new solutions, so please come back to this page if you don't see what you want today. The important thing is to get going - perhaps to start with an inexpensive solution which is not perfect, before moving on to an ideal solution.

If you are considering self-service units, we have put together a questionnaire which you can download here to help ask some of the questions you should consider. You may also find it helpful to work out what the business case is, and we have put together a small calculator for you to use.



Attended units

Attended use means that someone has to operate the card reader in order to take a payment, just like in a shop.





Self-service units

Unattended units are self-service devices allowing a donation to be made. Some devices can be secured so that they can be left in an empty building, others cannot so are best for use only where the building is staffed or for retiring collections.



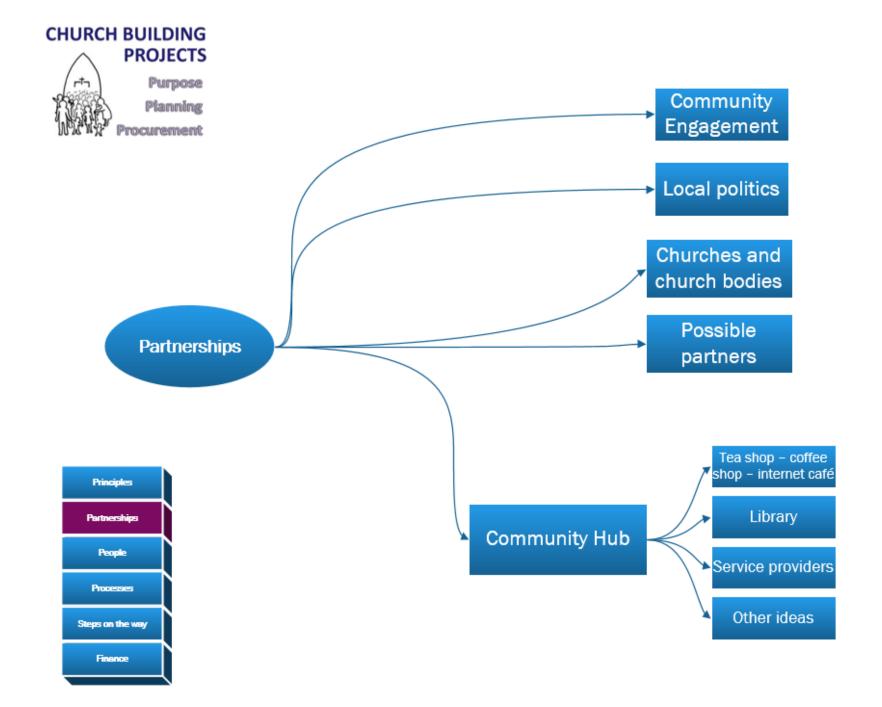




Sharing

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



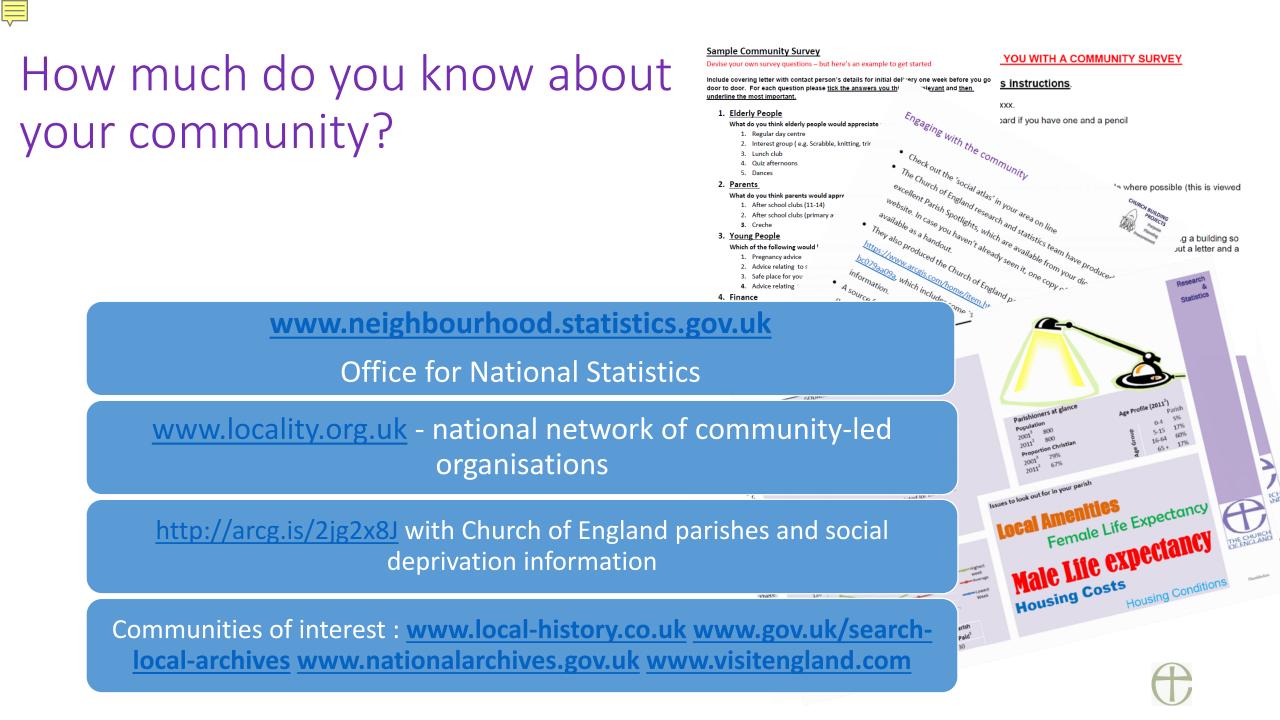




Community Engagement

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









- <u>https://www.northyorks.gov.uk/economic-information-and-analysis</u>
- <u>https://insight.eastriding.gov.uk</u>LderNess
- <u>http://cityplanhull.co.uk/</u>

SOUTH HOLDERNESS

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

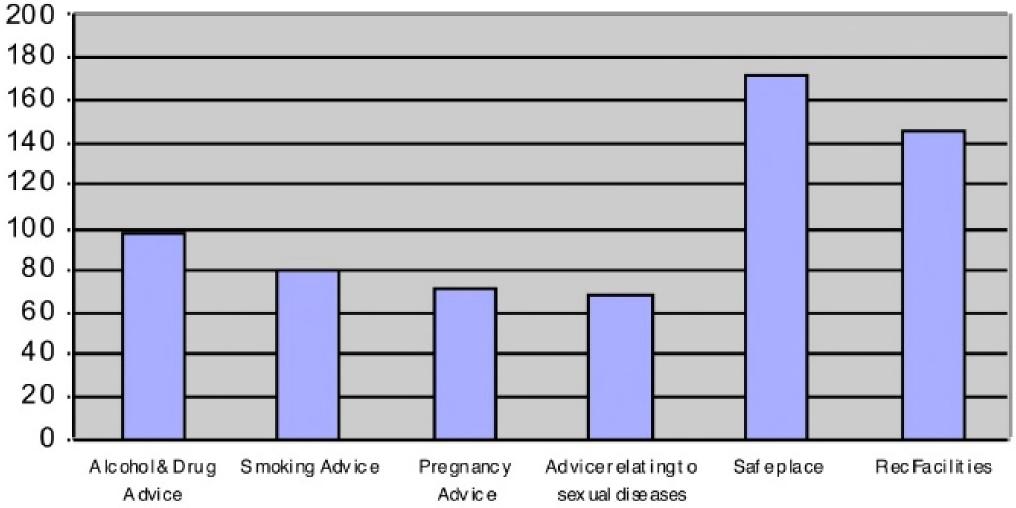
Sharing

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

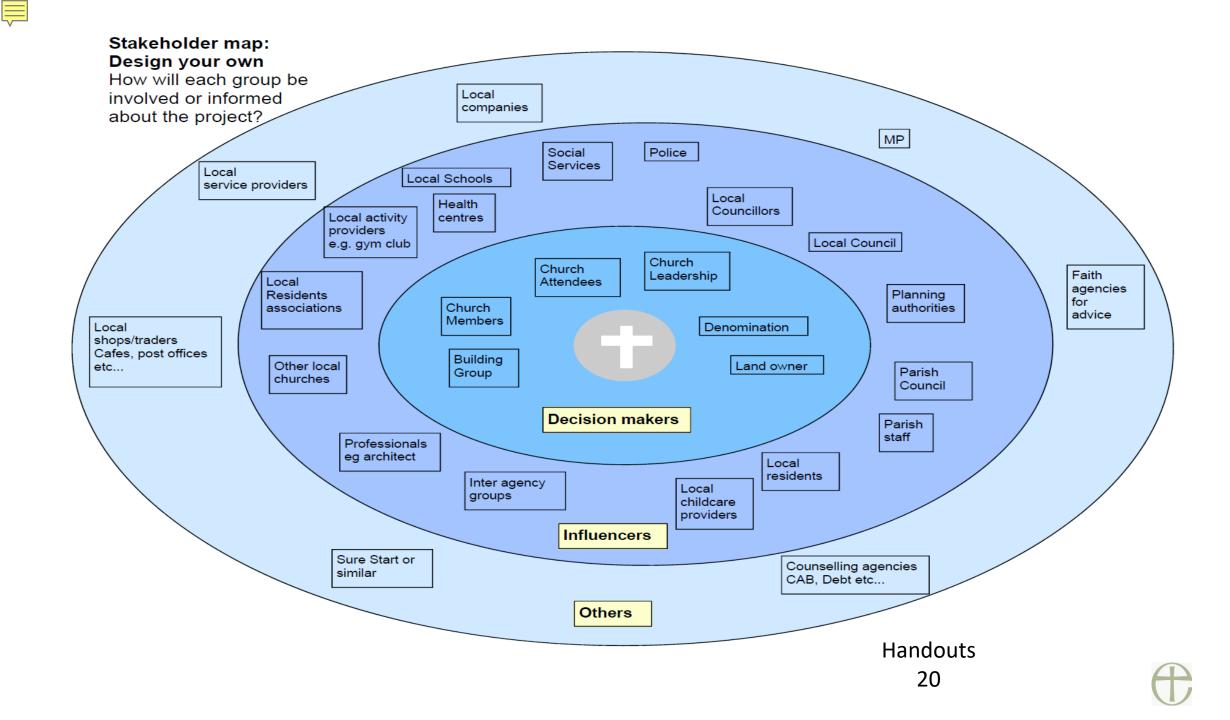


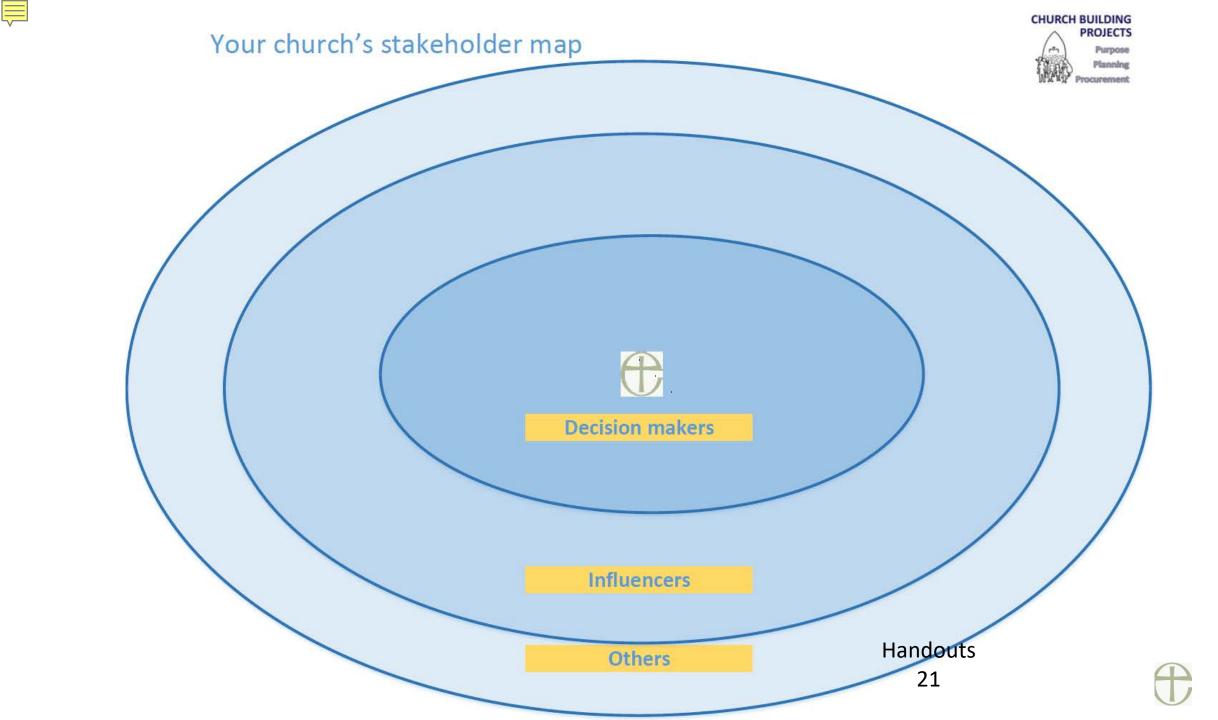
People saying "Yes" to Young People Issues

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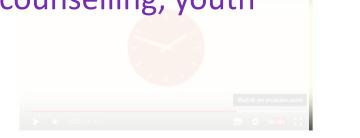
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Local Government & Politics

- 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/



2. Contact us using the form below, including the location of the organisation itself.

3. A local Citizens organiser will be in touch to tell you what is going on in your area, and will offer to meet with you to discuss further (if there is no Citizens alliance in your area, you could help start one).







GET INVOLVED ~ LOCAL CHAPTERS ~



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



Community Hub

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- 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/

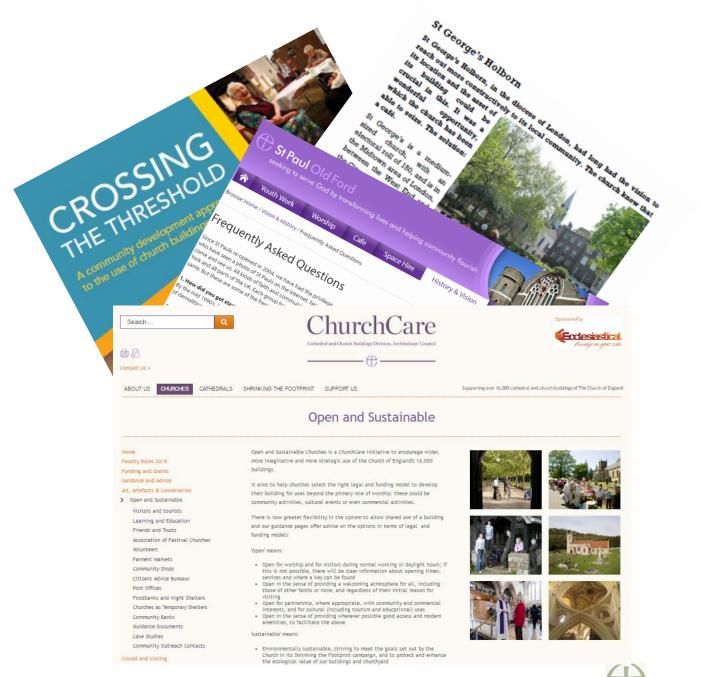
http://www.churchcare.co.uk/churches/opensustainable

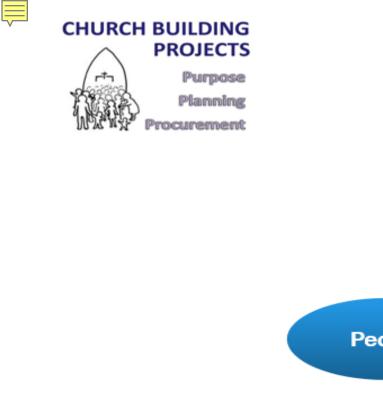
http://www.stpauloldford.com/vision/frequen tly-asked-questions/

https://www.hereford.anglican.org/Crossingth ethresholdtoolkit/

http://www.inspirednortheast.org.uk/usefulinformation/

https://www.canterburydiocese.org/media/o utlook/churchbuildings_winter2013.pdf





Principles

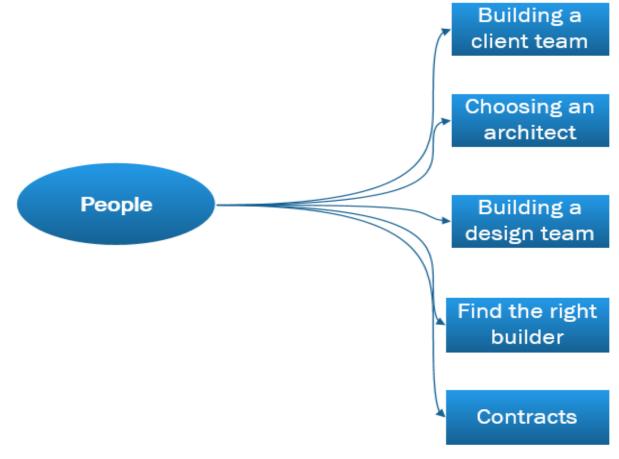
Partnerships

People

Processes

Steps on the way

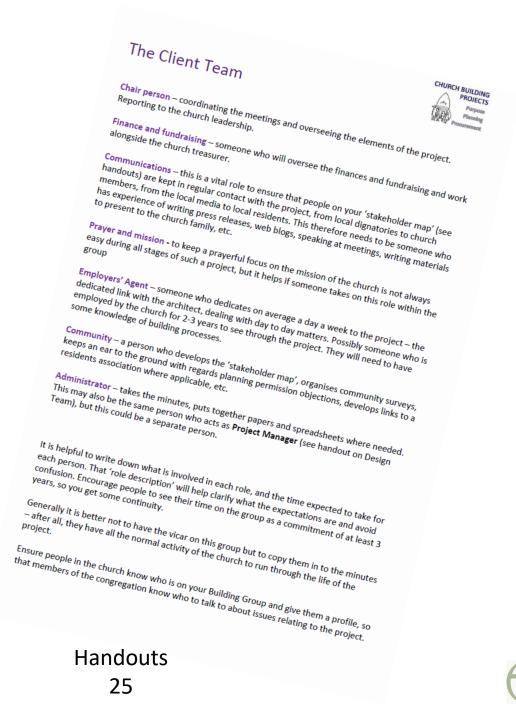
Finance





Building a client team

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





Other essential roles

Health & SafetyPoint of contact for professionals, builders etc



Group share

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Share

How to find the volunteers

Worth a try: <u>https://do-it.org/</u> <u>www.yorkcvs.org.uk</u> <u>http://hullcvs.org.uk/</u> <u>https://ervas.org.uk/</u> Best of all: Community engagement and networking



Choosing an architect

Obvious things

- ✓ Technical skills
- ✓ Ability to manage
- ✓ Relevant experience/accreditati on
- \checkmark Practice of the right size

Not so obvious things

- ✓ Good relationship
- ✓ Imagination
- ✓ Keep to scope
- ✓ Good value
- set of drawing presenter, wit ✓ Dialogue for design t Once you ha achieve mission through a p the next sta Tendering objectives For peop respond t interviev

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

Handouts

scoping

'superfluous'). Good possible.

But scoping is not

is being sought.

Scoping people

To get to a desig define the need project there are

someone who

For wor works s



28-30

Handouts

Page | 1

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

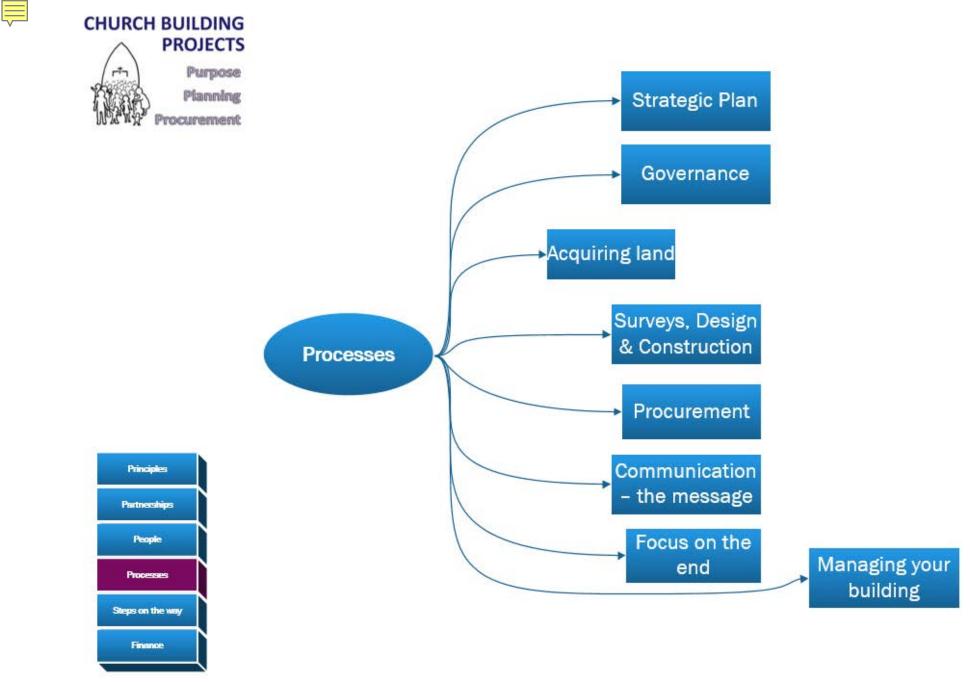


Find the right principal contractor

- 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

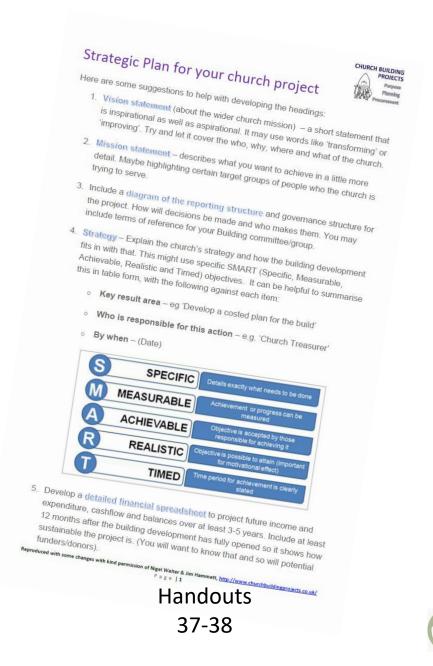






Strategic Plan

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



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)



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	Home Sign In Register Church Search Site Map Church Heritage Record Search the site P 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.	() A https://facultyonline.churchofengland.org/FAS/Form8/Form8.aspx?id=933#Ap 90% C Search 2 Edit 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:
Surveys, Design & Construc	<complex-block></complex-block>	Heritage statements Archaeological reports Conservation reports of buildings or objects Plans & photographs The information you upload will be stored in the <u>Church Heritage Record</u> 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. E Document title: Vear / Date: Originator: Copyright: Description:

https://facultyonline.churchofengland.org/churches



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Project route map: 8 RIBA stages, 0-7

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0	RIBA 🛱		into a number of key stages. The	content of stages may vary or over	igning, constructing, maintaining, arlap to suit specific project require professional services contracts and	operating and using building projec ments. The RIBA Plan of Work 201 I building contracts.	ts 3 www.rib	aplanofwork.com
RIBA Plan of Work 2013			2	3	4 ()	5	6	7
Tasks 🔻	Strategic Definition	Preparation and Brief	Concept Design	Developed Design	Technical Design	Construction	Handover and Close Out	In Use
Core Objectives	Identify client's Business Case and Strategic Brief and other core project requirements.	Develop Project Objectives, including Quality Objectives and Project Outcomes, Sustainability Aspirations, Project Budget, other parameters or constraints and develop Initial Project Brief. Undertake Passibility Studies and review of Site Information.	Prepare Concept Design, including outline proposals for structural design, building services systems, outline specifications and preliminary Cost Information along with relevant Project Strategies in accordance with Design Programme. Agree alterations to brief and issue Final Project Brief.	Prepare Developed Design, including coordinated and updated proposals for structural design, building services systems, outline specifications, Cost Information and Project Strategies in accordance with Design Programme.	Prepare Technical Design in accordance with Design Responsibility Matrix and Project Strategies to include all architectural, structural and building services information, specialist subcontractor design and specifications, in accordance with Design Programme.	Offsite manufacturing and onsite Construction in accordance with Construction Programme and resolution of Design Queries from site as they arise.	Handover of building and conclusion of Building Contract .	Undertake In Use services in accordance with Schedule of Services.
Procurement *Variable task bar	Initial considerations for assembling the project team.	Prepare Project Roles Table and Contractual Tree and continue assembling the project team.	of the design or the design or the design or the design or the second se	trategy does not fundamentally a le level of detail prepared at a give nges will vary depending on the s Contract. A bespoke RIBA Plan ering and procurement activities t relation to the chosen procurement	en stage. However, selected procurement of Work 2013 will set that will occur at each	Administration of Building Contract , including regular site inspections and review of progress.	Conclude administration of Building Contract.	
Programme *Variable task bar	Establish Project Programme.	Review Project Programme.	Review Project Programme.	stages overlapping or be 2013 will clarify the	ay dictate the Project Programm ing undertaken concurrently. A be a stage overlaps. The Project Pro stage dates and detailed program	spoke RIBA Plan of Work>		
(Town) Planning *Variable task bar	Pre-application discussions.	Pre-application discussions.	Planning applica A bespoke RIBA	ations are typically made using th Plan of Work 2013 will identify v application is to be made.	e Stage 3 output. when the planning>	•		
Suggested Key Support Tasks	Review Feedback from previous projects.	Prepare Handover Strategy and Risk Assessments. Agree Schedule of Services, Design Responsibility Matrix and Information Exchanges and prepare Project Execution Plan including Technology and Communication Strategies and consideration of Common Standards to be used.	Prepare Sustainability Strategy, Maintenance and Operational Strategy and review Handover Strategy and Risk Assessments. Undertake third party consultations as required and any Research and Development aspects. Review and update Project Execution Pian. Consider Construction Strategy, including offsite fabrication, and develop Health and Safety Strategy.	Review and update Sustainability, Maintenance and Operational and Handover Strategies and Risk Assessments. Undertake third party consultations as required and conclude Research and Development aspects. Review and update Project Execution Plan, including Change Control Procedures. Review and update Construction and Health and Safety Strategies.	Review and update Sustainability, Maintenance and Operational and Handover Strategies and Risk Assessments. Prepare and submit Building Regulations submitsion and any other third party submissions requiring conset. Review construction Strategy, including sequencing, and update Health and Safety Strategy.	Review and update Sustainability Strategy and implement Handover Strategy, including agreement of information required for commissioning, training, handover, asset management, future monitoring and maintenance and ongoing complication of VAs- constructed' Information. Update Construction and Health and Safety Strategies.	Carry out activities listed in Handover Strategy including Feedback for use during the future life of the building or on future projects. Updating of Project Information as required.	Conclude activities listed in Handover Strategy including Post-occupancy Evaluation, review of Project Performance, Project Outcomes and Research and Development aspects. Updating of Project Information, as required, in response to ongoing client Feedback until the end of the building's life.
Sustainability Checkpoints	Sustainability Checkpoint — 0	Sustainability Checkpoint – 1	Sustainability Checkpoint – 2	Sustainability Checkpoint — 3	Sustainability Checkpoint — 4	Sustainability Checkpoint – 5	Sustainability Checkpoint – 6	Sustainability Checkpoint — 7
Information Exchanges (at stage completion)	Strategic Brief.	Initial Project Brief.	Concept Design including outline structural and building services design, associated Project Strategies , preliminary Cost Information and Final Project Brief.	Developed Design, including the coordinated architectural, structural and building services design and updated Cost Information.	Completed Technical Design of the project.	'As-constructed' Information.	Updated 'As-constructed' Information.	'As-constructed' Information updated in response to ongoing client Feedback and maintenance or operational developments.
UK Government Information Exchanges	Not required.	Required. BA Plan of Work 2013 via www.rtbaplanofw	Required.	Required.	Not required.	Not required.	Required.	As required.

So What Are The Stages?

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

 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

 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
- Stage 5 Construction: The contractor gets ready to begin work and then
- 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
- 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

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

Handouts 39-41



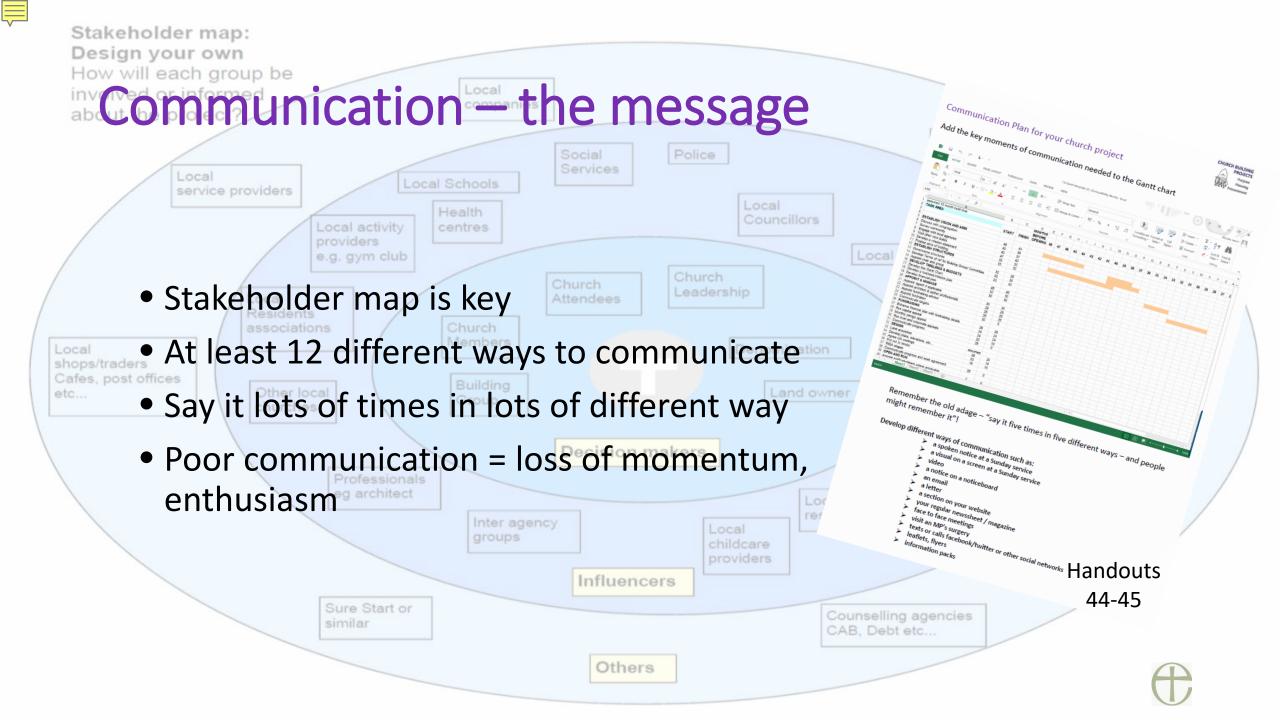
Procurement – the stages

- 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 o



Purpose

Sharing

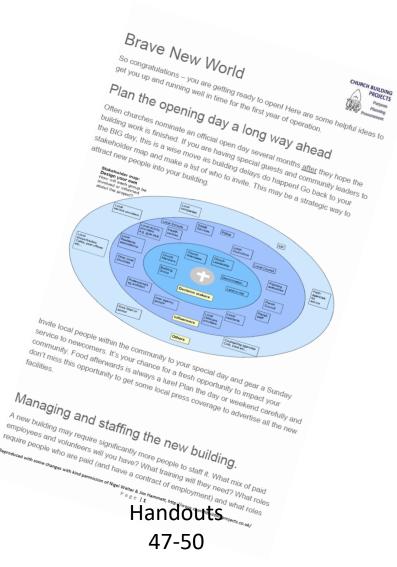
Short discussion on communication – have you experience at your church (or elsewhere) – some tips or questions you would like to share?



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

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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	COST per	ANNUAL	Year	Inte	rvals						COST over
	CYCLE	CYCLE	COST	2	5	10	15	20	25	30	other	30 YEARS
REGULAR MAINTENANCE											·	
Clean Gutters and Downpies	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, fue	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

10 yr	5,000	500										
	5,000	500		*		*		*			15,000	
20 yr	10,000	666			*				*		20,000	
as & when	3,000	300			*		*		*		9,000	
100+ yr	25,000	834				*					25,000	
100+ yr	60,000	2,000					*				60,000	
10 yr	3,000	300		*		*		*			9,000	
10 yr	3,000	300			*		*		*		9,000	
150 yr	150,000	3,000								50	90,000	
25 yr	25,000	833						*			25,000	
25yr	15,000	500						*			15,000	
25 yr	35,000	1,166						*			35,000	
15 yr	12,000	800				*			*		24,000	
20 yr	18,000	600					*				18,000	
		11,799									354,000	
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			Proj	ect Ta	rget	Comp	letio	1			П	anuouu
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one off	130,000	13,000			*							F 4
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http://www.parishresources.org.uk/wp-content/uploads/Asset-Management-Plan.xls

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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

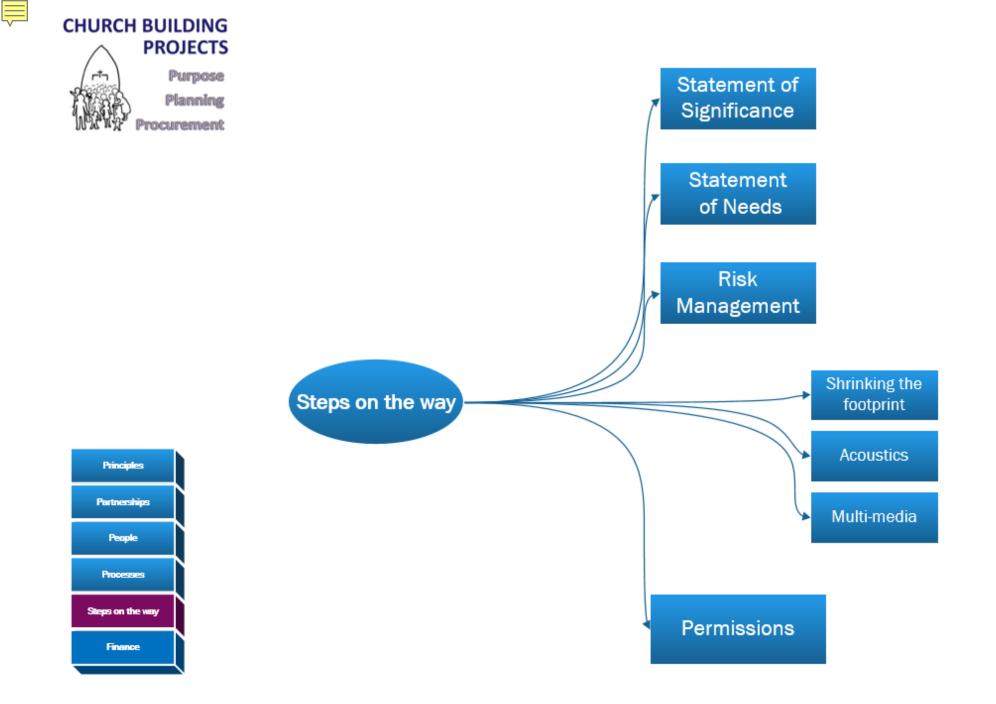
	KNOWN	COST per	ANNUAL	Year	Inte	rvals						COST over
	CYCLE	CYCLE	COST	2	5	10	15	20	25	30	other	30 YEARS
REGULAR MAINTENANCE												
Clean Gutters and Downpies	3 months	200	800									24,000
Clean Gullies and drains	3 months	50	200									6,000
Boiler Service	annual	200	200									6,000
Ventilation 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, fue	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				Whe	n wor	'k wil	l be r	equir	ed			
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				Proje	ect Ta	rget	Comp	letior	า	
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	

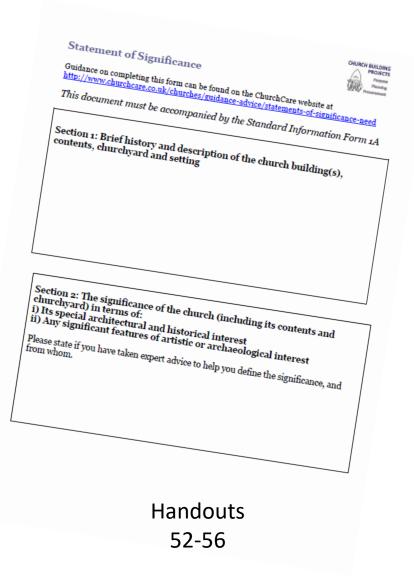






Statement of Significance

- 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





www.churchcare.co.uk

Search Q	ChurchCare	Sponsored by Example 1 Always on your side
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

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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





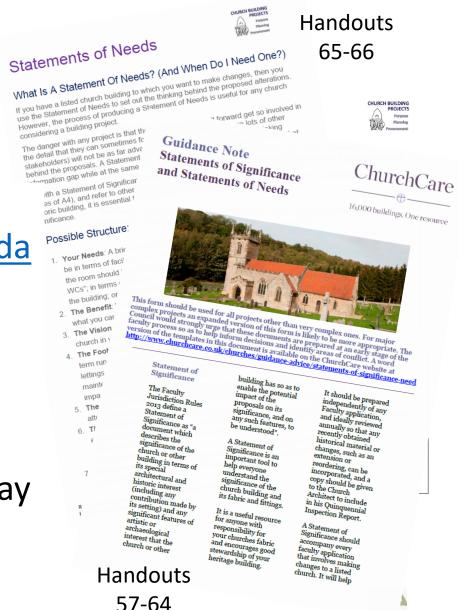






Statement of Needs

- Good advice on available on <u>http://www.churchcare.co.uk/churches/guida</u> <u>nce-advice/statements-of-significance-need</u>
- 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)





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

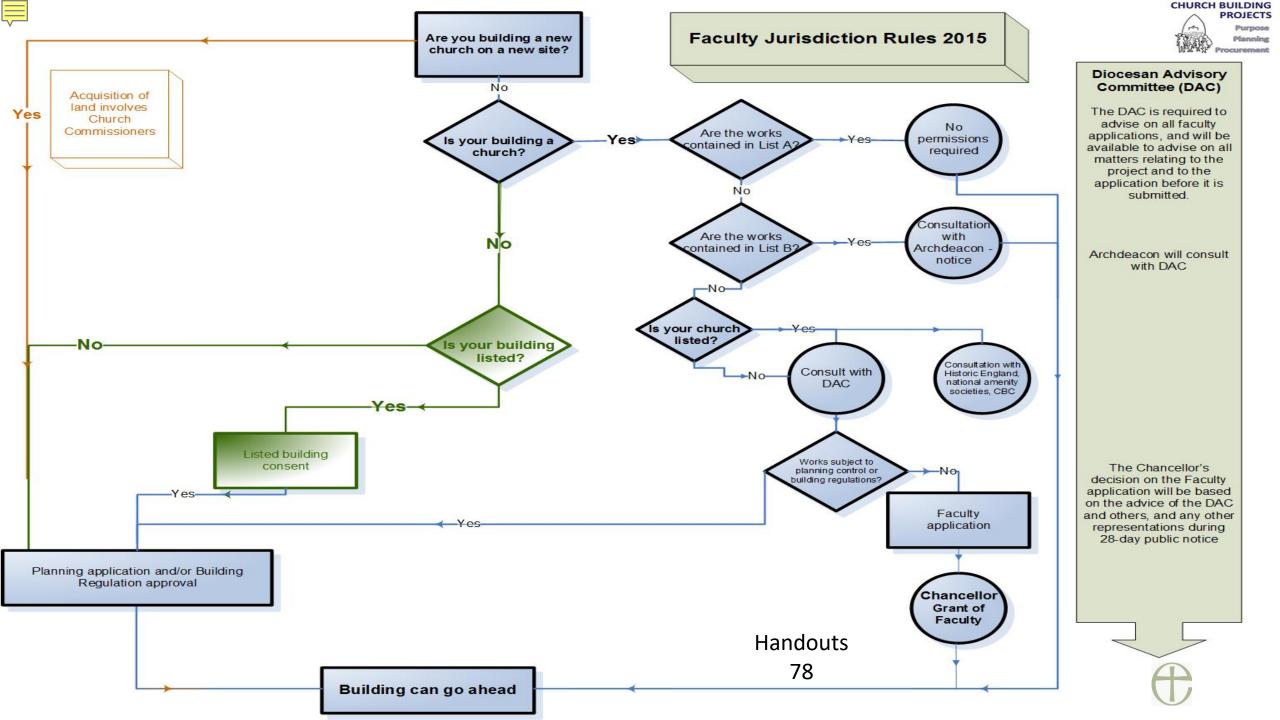
Effect of new build, Reorganisation of space,

Amplification for music or speech, Furnishings, carpeting, Separate spaces

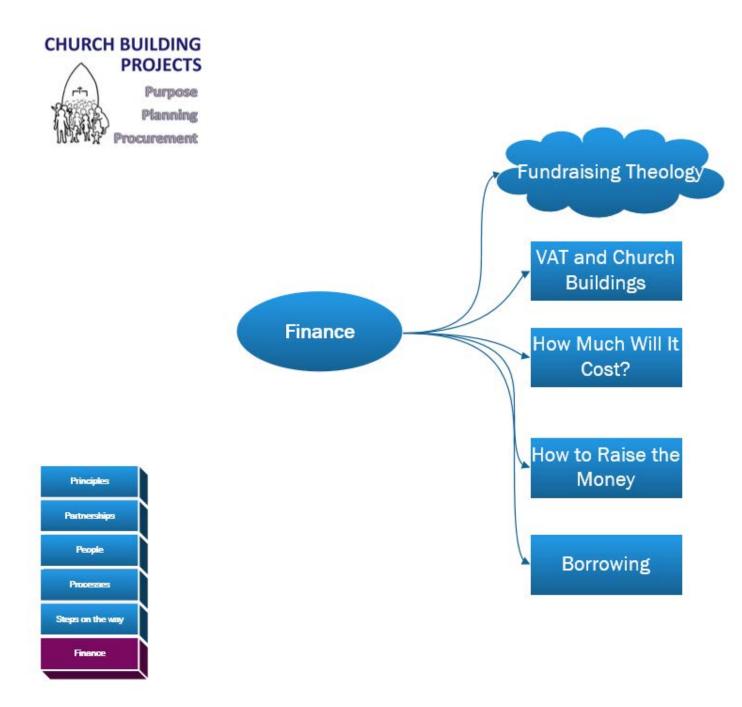
Multi-media

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

	Acoustics	
	The acoustic design and pe	CHURCH BUILDING PROJECTS Proceeding Proceeding
	Multi-Media	CHURCH BULLDING PROJECTS Purpose Processment Processment
	Sound Desk	CHURCH BUILDING PROJECTS
	Assuming	Prosition Processment Of
	 as production, we should use positively, church buildings present us with an into practice. Technologies Building form: The first and in the orientation and form of the more wasteful of energy is surface area (and thus heat surface area (and thus heat is surface area (and thus heat is surface area (and thus heat is ginificant impact on how in place it can gain benefit for place it can gain benefit for a Building Construction? Building Construction? Heat recovery Any more those windows can into the building. Photovottaic calls (F Repr Government to make come down a lot. W 	ution, we in Weese us anything, we Genesis 1-3 teaches us anything, we this religious Right may disagree, but then the religious Right may disagree, but then this in the first place. A christian duty to look after the world as best we proceed energy use and therefore greenhouse on we design and use our buildings. And more make opportunity to put an environmental theology mole opportunity to put an environmental theology that the because it will have a higher ratio of it will be, because it will have a higher ratio of loss) to volume (activity). Simple as how your building is oriented has a disting the set will the summer. The next place to look is the amount of nearly it uses. With windows in the night is used to overheat in the summer. The next place to look is the amount of the disting sublation, if we want to be green, we should be aiming sublation, if we want to be green, we should be aiming sublation, if we want to be green, we should be aiming sublation, if we want to be green, we should be aiming sublation, if we want to be green, we should be aiming sublation, if we have the still requires a subsidy from that waste heat is not pumped outside but fed backs and haves heat is not pumped outside but fed backs is a technology that still requires a subsidy from eavy financial sense, though this level of subsidy has eavy financial sense, though this level of subsidy has in the subsidy this is effectively a simple investment, sim the subsidy this is effectively a simple investment in the duilding at a background temperature. The celeficially powered heat exchangers — it is the same
Handouts 69-77	Heat Pumps. The technology as use inside. Heat pum Bepreduced with some changes	The maintain use of the set extension outside to the set from outside to the set from outside to the set from outside to the set of the set from outside to the set of the set



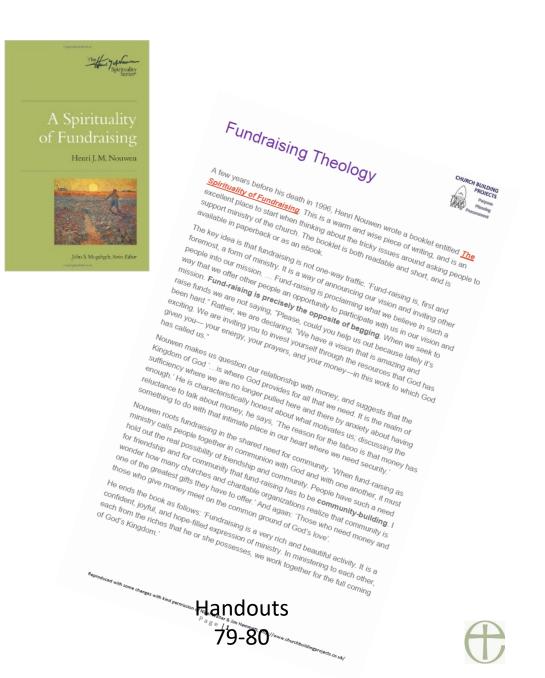






Fundraising

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



How to Raise the Money



83-87

- Internal: Capital Appeal, Congregational Pledges, Sponsored events, Online
 Appendix 1: A constitution (this is
- 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)
- <u>http://www.parishresources.org.uk/resources-for-treasurers/funding</u>
- <u>http://www.parishresources.org.uk/friends-schemes/</u>
- <u>http://www.parishresources.org.uk/legacies/</u>

How to Raise the Money

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Indicative Campaign Timeline (Excerpt)

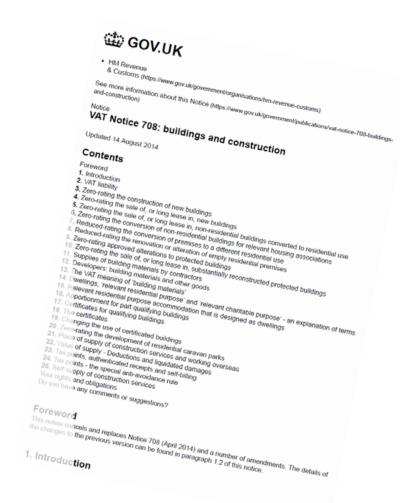
	Actions	J	A	S	0	N	D	J
	1. Planning Phase							
	2. Private Phase							
	3. Public Phase							
	4. Consolidation Phase							
	Campaign Plan							
	Internal Preperation							
	PCC Meetings							
	Business Plan							
 Attend 'Planning a Success 	sful Capital Campaign'							
-								
workshop	Campaign Management							
• This template available as	Campaign Budget							
 Inis template available as 	a dowahlogadan development							
	Chair Recruitment							
	Campaign Volunteer Recruitment						-	
	Chair Recruitment for Sub Committees							
	Team Meetings				-1			
	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							<u> </u>



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



How much will it cost?

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



Using the budget template CHURCH BUILDING PROJECTS Having a robust system of budgeting is vital to the success of the project. That not only consists of naving a rouse system or outgeting is vital to the success or the project. That not only cons 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 up to a build and for 2 years There is an excertempiate that you can use for a 3 year period reading up to a build and for 2 years afterwards (to demonstrate sustainability of the project). See below for some notes on using this 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 year and monitor it on a monthly basis. If you decide to use the helpful budget template from Churchbuildingprojects.co.uk, this can be in you decide to use the helpful budget template from unurchoulidingprojects.co.uk, this can be downloaded from the Downloads section on that website (it will also be available on the handouts You will of course need to be familiar with Excel. Please take care not to change formula in the cells Start by entering your opening balance (cell C49 coloured in light yellow on purple tab sheet Year-3).

Handouts

81-82

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



Purpose

Sharing

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



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 (<u>http://www.parishresources.org.uk/friends-schemes/</u>)



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Time for general discussion: your questions, your comments





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?

