

26<sup>th</sup> February 2015

Hope Church at St David's  
Westbourne Road  
Islington  
London N7 8AB



# Managing major building projects in *places of worship*

## I. BEFORE WE START

- Do we have a clear 'vision statement' of what it is we propose to do, and why?
- Have we considered all the other options?
- Has it been agreed by everyone, or are there those who oppose it?
- If so how are we going to keep them 'on-side'?
- Are we clear about how it fits with everything else we do or plan to do?
- How will we ensure that our management of the project is in line with the principles of our faith?
- Are we confident that we have the resources to manage this project ourselves, or do we need help?

## 2. WHO?

- Who (e.g. PCC, fabric committee) will be overseeing this project on our behalf - in other words whose name will be on the building contracts?
- Who outside of our faith group needs to be involved (e.g. community partnerships, stakeholders, grant-makers, amenity bodies)?
- Who will be the lead point of contact for the construction team (e.g. if they need an urgent decision?)
- Who will be the lead point of contact for the rest of our faith group - to make sure everyone is up to date with what is going on?

## 3. HOW?

- How much money do we think we will need to fund the work?
- How will the money be raised?
- How will we ensure that the money is available when needed (e.g. stage payments)?
- How will we ensure that the project stays within budget (cost planning, cost checks)?

## 4. WHEN?

- When do we hope the work to start?
- When would we like it all to be finished?
- When, in this overall timescale, do we need to do the things on this checklist (project planning)?

## 5. WHAT?

- What professional consultants do we need to appoint, and what help and advice do we need to select them?
- What legal duties do we have (e.g. health and safety law)?
- What permissions do we need from within our faith organisation?
- What permissions do we need from other authorities?
- What other building work would it make sense to do at the same time?

## 6. WHERE?

- Where will we do the things we do whilst the work is going on?
- Where can the builders go and where must they not go?

## 7. WHAT IF?

- What will we need to do if unforeseen things cause the project to cost more than planned?
- What will we need to do if unforeseen things cause the project to take longer than planned?
- What can we do to avoid 'project creep'?
- What if something unexpected happens - how can we minimise the risks?

## Roger Munday

Architect, Administrator,  
"Living Stones: The Church +  
Community Trust"

Roger's session will explore how faith communities commission building work for one of two reasons: either because they have to (e.g. repairs) or because they want to (e.g. reordering). Add in the facts that they comprise volunteers who usually don't own their building, and for whom facilities management is far from their prime reason for belonging, or area of expertise, and the result is bound to influence the way they approach and manage the project.

## 8. AND THEN ...

- How will we measure whether our project has been a success?
- What has been the effect of the project on our faith group?
- How can we use our experience to help others who may be planning something similar?



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### 1. VISION SETTING – CONGREGATION

A church building is a 'house of God' so how can faith and spirituality be put at the heart of a project from the beginning? How can a congregation 'own' a project and in parish settings where projects may take years to complete, how can the participation and morale of a congregation be sustained? How does the professional team connect with the congregation?

### 2. VISION SETTING - COMMUNITY

In many ways, separating congregation and community is a false distinction as church members are those who live in the local community! But how can those who wouldn't see themselves as 'church members' be involved in vision setting and in the ongoing work of project development? What structures need to be put in place? What communications strategies might be used? What professional input is needed?

### 3. PARTNERSHIP WORKING

As the 'vision narrative' crystallises and potential new activities and uses of the church building emerge, who might be interested in running them? The PCC? A charity or charities? The local authority? A small business? How can partnerships be built? How much commitment does there need to be and how might that change as the project develops?

### 4. BUSINESS PLANNING

It is vital to have a Business Plan to bring hopes and aspirations, consultation and research, facts and figures, into a coherent document. The vision may be stunning but how does it 'stack up' financially? The Business plan must be robust and where external funding is sought, it will come under intense scrutiny. Get realistic figures from other projects. What level of maintenance will be needed? Staffing costs? How will income be generated? Hire fees, leases and licences?. What are the risks? Step 1: who is going to write the Business Plan?

### 5. GOVERNANCE – DEVELOPMENT

In the Church of England context, final decisions need to be taken by the PCC. But other groupings can be helpful in drawing a wider range of people and expertise together and refining recommendations that can then be presented to the PCC. Such groupings may include the professional team, local stakeholders, potential partners. Terms of reference need to be agreed at an early stage to clarify the boundaries of accountability, decision making and actions.

### 6. GOVERNANCE – ON SITE

Once the project is 'on site' it may seem that the professional team and contractors take over. But how can the PCC, project groupings and wider community remain connected and be mobilised for the day when 'the keys are handed over'?

### 7. GOVERNANCE - ONGOING

There are various models of ongoing governance. Go and talk to other PCC's and see what has worked and what hasn't. The Diocese may have specific advisors too. The PCC is a legal entity so you don't necessarily need to set up new legal structures. If a sub-committee is set up what are the terms of reference and lines of accountability?

### 8. LAUNCH!

The project team may be exhausted but a 'launch' is a wonderful way to strengthen relationships, re-connect with some and draw in new people. Plan communications strategy including the media. Identify who will energise this. Challenges of 'living the dream'.

### 9. LEGAL RESPONSIBILITIES

Ideally licences and leases with partners/tenants can be finalised while works are on site. Legal advice is essential but get clarity on fees from the outset. If your church buildings have flexible spaces, hire agreement documentation and hiring policy will also be vital. Will there be any groups to whom you

### Revd Canon Philippa Boardman Canon Treasurer at St Paul's Cathedral

Philippa's talk will cover how to build ownership of a project within the church and across the wider community, right from the beginning of project vision setting. Drawing on her own experience as Vicar of St Paul's Old Ford, she will highlight the strategies used during a marathon seven year development period through to the re-opening of the church in 2004. Philippa will also reflect on what has enabled the project to both survive and flourish, recently celebrating the 10<sup>th</sup> anniversary of its re-opening.

will not hire space? Will you have a sliding scale of charges? How late will you allow bookings to go on? Who will do the cleaning? Who will oversee the bookings process and the event itself? If staff are employed, good recruitment and staff management procedures are needed, contracts, staff handbooks and policies.

### 10. RENEWING VISION

How can the original project vision be renewed and refreshed? 'Induction' of new PCC members and worshippers. Recruitment and management of staff and volunteers who 'get it'. PCC away days. Strategic planning with staff and partners. Financial planning. Succession planning for departure of original 'project champion(s)'. Sharing learning with others. Keep celebrating!

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## 1. ARE YOU READY TO START ASKING FOR MONEY?

It's tempting to rush into asking people for money but have you reached that stage? Is the vision clear? Has your project been fully costed? Have you set out a strong case for support? Is your target realistic, and what are your plans for fundraising?

## 2. HAVE YOU DONE A COMMUNITY AUDIT OR A BUSINESS PLAN?

Larger projects may well need both of these. Funding bodies will be looking for evidence that your project is needed, and that it is well-planned and realistic. Working on these is also a good way of getting church members involved.

## 3. IT'S NOT JUST ABOUT THE BUILDING

Your plans for the new extension may look wonderful, but most donors are more interested in the benefits for people. How will church members benefit? How will the project enable you to work more closely with the wider community? What will you be able to do that you can't do at present?

## 4. DEVELOP THE CASE FOR SUPPORT

A useful exercise early on is to list and discuss all the key points and messages about your project – the scope of the work, why it's important, all the benefits, costs, etc. This helps to clarify and strengthen the fundraising messages.

## 5. ASK CHURCH MEMBERS FIRST

The appeal must start with church members, who should be as generous as they can be. External donors will want to know that church members are fully behind the project before they commit themselves.

## 6. BE OPEN ABOUT MONEY

For fundraising to be effective, you'll need to be upfront about levels of giving needed, funding targets and deadlines, and church finances in general.

## 7. NOT JUST A GIFT DAY

Gift Days can be very successful, but will not achieve much on their own. Meetings, one to ones, and presentations will be needed to explain the project, build motivation and enthusiasm, and deal with objections and concerns.

## 8. BE REALISTIC ABOUT EXTERNAL FUNDING

Is your project likely to be of interest to external funders? Do some research first to check the potential and identify sources in your area. What have other churches achieved?

## 9. DEVISE SOME FUNDING PROPOSALS

"Please support our appeal" is not enough nowadays. Donors prefer to pay for or contribute to, something specific e.g. the cost of a room, furniture or equipment needed, your work with children or elderly people. Details and costs of these need to be worked out so that you can send targeted proposals to relevant funders.

## 10. TEAM EFFORT

The appeal will need strong leadership, a steering committee of some kind, good administrative support, and lots of people helping through prayer and in many different ways. The fundraising process works best when lots of people are involved in lots of activities – but well coordinated and within a short timescale.

## 11. APPEAL TIMESCALE

Enthusiasm and momentum can soon be lost if things are allowed to drag on. Fundraising should be top priority for your church – but only for a limited period. Depending on the size and complexity of the project, plan for the appeal to be completed in roughly two years, i.e. six months for preparation and planning; three months for the members appeal; twelve-fifteen months for the external appeal.

## Graham Collings Independent Fundraiser

Fundraising is not a difficult skill to learn, and most churches have some experience of it. But any large-scale campaign needs the right techniques and tactics, and careful planning if it is to succeed. This session will cover key areas such as:

- Timescales and where fundraising fits in to your project planning
- The stages of your appeal – plans and strategy
- Who does what - managing fundraising
- Methods and techniques for raising funds both within and outside your church
- Some do's and don'ts

Dozens of churches have raised six and seven figure sums for their building projects over the past year - yours could too!

## 12. FUNDRAISING IS A PEOPLE BUSINESS

Letters and leaflets have their place, but any major appeal needs people talking to people, e.g. to persuade members about the levels of support needed, to convince the sceptics, to identify and use contacts that people may have, and not least to convey your enthusiasm!



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## Working with your Architect • Jane Kennedy

What should your inspecting architect or surveyor offer you?

Key skills and knowledge:

- An understanding of your building's history
- Sympathy with how you want to use it
- A track record of understanding building defects and managing repair programmes
- A track record in ability to plan and guide repair and alteration projects
- Knowledge of the local consents processes
- Knowledge of where to find specialist advice,
- Knows when archaeological advice will be needed
- Knowledge of funding for church projects
- Enthusiasm for working with your team

## Building a Church Project Design Team • Stephanie Norris

### 1. CHOOSING AN ARCHITECT

The right architect - what are you looking for? Ask for advice and where to start your search. Look at work elsewhere. Think about the type of your project – do you need an architect who respects and understands old buildings and their significance and is skilled in combining old and new? How to make best use of the retired architect on the PCC.

Shortlisting and interview – how will your project fit into their practice? Why is it important to them? Ask for references and for examples of other projects you could go and visit. Do you ask your inspecting architect? Establish technical and design skills, size, knowledge of churches and the planning processes and cost. Is it important to deal with someone who shares your faith?

### 2. BUILDING THE REST OF THE DESIGN TEAM

Many different people may need to be involved in your building project, so knowing who is who and when you need to make these appointments is important. Roles of the core appointments including CDM Co-ordinator; Quantity Surveyor; Services Engineer; Structural Engineer and Building Inspector.

### 3. WHO ELSE MAY NEED TO BE INVOLVED?

Depending on the type of project, you may need advice from other specialists. I.e. a Party Wall Surveyor; Acoustic Engineer; Audio Visual Engineer; Lighting Designer or Kitchen Designer.

### 4. THE RIBA STAGES

The RIBA Plan of Work as revised in 2013. Most building projects go through the same basic stages. What are these different stages, how do they fit together and what are the typical timescales involved? The importance of preparation. When does the actual building work take place?

### 5. LEADERSHIP WITHIN THE CHURCH COMMUNITY, BRIEFING AND DECISION MAKING

How does leadership within the church community result in a successful project? The importance of consultation with the PCC, congregation and wider user groups. The need for clear and agreed briefing. Establishment of lines of communication and authority for decision making. When is it appropriate to have a paid Project Manager?

### 6. MANAGING THE CONSTRUCTION PROCESS

Choosing the right builder. At what point in the process do you appoint the builder? What should you look for? Procurement methods and tendering. Managing change and cost control during construction.

## Jane Kennedy & Stephanie Norris

### Partners and Architects, Purcell

This session will cover two areas; working with your architect and building a church project design team.

To make sure that the project will deliver the benefits which were intended, a number of things are critical: a clear brief, maintaining a well-planned schedule, management of any risks, keeping various stakeholders happy and ensuring the project team is working together. Sometimes it will be appropriate to bring in a professional to handle this role, chosen from outside the church community. This can present its own challenges.

### 7. KEEPING THE TEAM WORKING TOGETHER FOR A SUCCESSFUL OUTCOME

The importance of maintaining momentum and enthusiasm through the life of a project. Ensuring client ownership of the project. Managing design change because change happens. Agreeing and maintaining a programme and pattern of regular meetings. Making sure you allow time to celebrate and enjoy your vision!