

1: Mission Action Plan

- 1.1 This is the building block for all parish mission. There is an advice leaflet available and please contact your office for further advice..
- 1.2 These documents need to be produced before the parish makes fundamental decisions on property.
- 1.3 The Community Audit is an important part of this process and the development team is producing guidance on how to carry out a community audit and this will feed into the Mission Action Plan.
- 1.4 The Mission Action Plan needs to be ratified by the PCC and then approved by the Area Dean and then Area Bishop.

2.0 Does the project fit the MAP?

- 2.1 The Mission Action Plan should inform the project. A building project should never dictate the MAP.
- 2.2 The PCC needs to carefully consider if the idea of a building project fulfils the Mission Action Plan, or whether it is a distraction.
- 2.3 If the project idea does not fulfil the MAP then the parish should stop and go back.

3.0 Establish Background information

- 3.1 This is a very important piece of work to do as it will have significant cost implications for the project if ignored until later.
- 3.2 The work is to establish what the legal status of the land and buildings is, so that there are no nasty surprises later. There should be a thorough investigation into any leases, deeds, covenants and planning restrictions that can be found.
- 3.3 There may also be restrictions on trust funds or trust property of which you were not aware.
 - The Parish records are the first port of call, then the Diocese Development Team (contact details included) and then the Diocesan Registry.
- 3.5 If the land is not registered with Land Registry, this should happen. Contact the Diocesan Project Development Manager.

- 3.6 **Establishing the right approach:** This is a good opportunity to have a meeting between all the stakeholders in the church, namely:

The Vicar
Churchwardens
Archdeacon
PMDA
Project Development Manager
Care of Churches Team
Finance Adviser
Community Ministry Advisor

- 3.7 Advice on who should be at this meeting can be provided by the Diocesan Project Development Manager. This meeting will feed into the establishment of the background information and help have as many of the facts about the land or buildings established as early as possible.
- 3.8 This meeting may also provide an early indication as to the potential of the project and will establish support for those projects which look likely to be successful.
- 3.9 Projects which, from experience, it is known will not succeed can be stopped or redirected so resources are not wasted.

4.0 PCC Resolution

- 4.1 Once all the risks associated with the land ownership have been covered, then the PCC should formally consider the project as there is a cost implication from now on.
- 4.2 The PCC can resolve to take the project to feasibility stage and this will mean seeking fee proposals for undertaking the feasibility study.
- 4.3 The correct way to seek fee proposals for the feasibility is to produce a brief for the report. In other words what do you want for your money? An outline is given below.
- 4.4 A feasibility brief is not a collection of design drawings, but a fairly detailed analysis of the potential of achieving the project as outlined.

5.0 Feasibility Brief

- 5.1 A typical outline of the feasibility brief would be:

Name of parish

Name of Project

Date:

Introduction:

This would be a brief description of the parish, what you do, how many of you there are, what your aspirations are etc.

You will add as an appendix, the Mission Action Plan

Project Outline:

This will give the broad parameters of what you wish to achieve with the project.

You can include all the details you found when you established the background information.

Work required:

What do you want the feasibility study to find out?

Do you want to compare several solutions to the same objective?

Do you simply want to know what the constraints are to achieving the project? These could be:

the requirement for planning permission/faculty,
the local planning policy which will not allow you to do what you want.
The site might contain listed buildings or be in a conservation area.
The trees might have tree preservation orders on them.

Other constraints could be the fact that someone just down the road has created the same building with the same purpose.

The site may not be big enough

The cost of construction might be very high due to nature of the land (it might be surrounded by buildings etc).

Can the development be made within existing resources? This is a good opportunity to provide the first outline business plan for the project. The business plan will deal with the cost and management from construction through to operation and needs to be reviewed and refined all the way through the project.

Does it require a development at all?

Is the building likely to be sustainable, both environmentally or financially?

With a good brief you can send it out to tender. This work does not necessarily need to be done by an architect. The parish needs to select the right person for the job and this might involve other professionals too. Advice can be sought from the Project Development Manager.

6.0 Feasibility Review

- 6.1 This is an opportunity to review the learning from the feasibility report.
- 6.2 If the report is produced in a readable way there should be clear choices as to the way forward and it could be that the best thing to do is nothing!
- 6.3 If the feasibility produces an option that the PCC think is the right way forward, then there should be a brief produced for the design team to create and outline design.
- 6.4 It is very important that the design team is given a strong brief from the parish and it is also important that it is clear how the project is going to proceed and at what point fees will become payable and how much.
- 6.5 Architects will be used to working to the RIBA plan of work, please see appendix
- 6.6 As you can see, after the feasibility review, the architect should be engaged up to Stage C. The feasibility review covers A and B and need not necessarily be done by the same professional or indeed an architect.
- 6.7 There should be advice in the feasibility report regarding the make up of the project team. This will include whether it is considered necessary to have a Project Manager, Architect, Surveyor, Structural Engineer or other professional; you are required by Law to appoint a Construction Design and Management (CDM) co-ordinator.

7.0 Consultation

- 7.1 After the production of an outline design, there should be consultation. Consultation is required to see if there is broad support for the project. This will help to inform any further design work that might be required and what the cost implications might be. Ignore consultation at your peril. It is better to have everyone on board at the early stages of the project, or see what objections there might be.

7.2 Consultation should be held with:

The parish
The Archdeacon
The DAC
The Diocesan Property Department
The Local Planning Authority
Amenity Societies, (for instance the Victorian Society,. Project Development Manager will advise)
Local Residents

Other partners involved in the project

Anyone else you want to!

7.3 The result of the consultation should then be considered in a formal outline review:

8.0 Outline Design Review

8.1 This review should take place to collate all the comments you have received back from the consultees and for your own comments.

NB Remember it is essential to consider the practicality of the design. Can you get in and out of the building, is there enough storage, is there too much storage, how will the building be used?

8.2 You may wish to take on board some of the comments and you may decide not to act on some of the comments, but you will have to prioritise them, not least for the cost implications.

8.3 Every change will have a cost implication and this is essential to keep an eye on the cost. The draft business plan which was drawn up as part of the feasibility should be reviewed at this stage too.

8.4 At the same time as developing the design you will be developing the business plan. This might need to be presented to the Diocesan Finance Committee.

8.5 A Risk Analysis should also be undertaken at this stage.

8.6 The approval of the PCC should be sought to proceed to the next stage of the project.

9.0 Finance Committee

9.1 As the PCC is unable to own property, property assets are usually held in trust by the London Diocesan Fund (Custodian Trustee) for the PCC (managing trustee). There are many different scenarios relating to land ownership. Your Project Development Manager will advise on the need

for the Finance Committee involvement. It is important to have some financial scrutiny of the project at this stage.

- 9.2 As a result of this situation, if there is to be any change to the land or buildings under question then approval will need to be sought from the Diocesan Finance Committee.
- 9.3 The process above will have provided you with the information necessary for the finance committee: the outline design and the outline business plan.
- 9.4 The reason for going to the Finance Committee at this stage is to seek outline approval for the scheme, before embarking on the major expenditure which is detailed design.
- 9.5 The Finance Committee will agree in principle to the development if the project stacks up and if the project does not substantially change then there will be no need to return to the finance committee.
- 9.6 Once the Finance Committee has provided financial scrutiny, and assuming that they agree then it is time to move to detailed design.
- 9.7 The next stage is where you start to pay large sums of money.

10.0 Detailed Design

- 10.1 This is the process of drawing up the scheme so that applications can be made for planning permission, or faculty or both and building regulations etc. This is where a Project Manager might be introduced if one has not been involved from the very start of the project.
- 10.2 The detailed designs are then presented to the relevant bodies and if there has been adequate consultation previously then there should be relatively little bother gaining consent.

NB: Please be aware that this can be a frustrating time trying to satisfy all of the relevant authorities and can take a long time. This should be built into the project plan.

- 10.3 If you fail to achieve consent for the project then the project will have to stop and reconsider what to do going back to the relevant stage if necessary.
- 10.4 On the assumption that all the authorities are satisfied then it is time to move on to tender the project.

11.0 Tender Process

- 11.1 The tenders for the work should be sent out by the Quantity Surveyor or Architect to at least three contractors.
- 11.2 The tenders are returned and a tender report is prepared and presented by the Quantity Surveyor or Architect. This will outline what each of the tenderers said and make recommendations as to who to appoint.
- 11.3 The tenders will tell you how much your project will cost to construct. It will not tell you how much it costs to run the project.

12.0 Finance Review

- 12.1 This is a crucial meeting to be held once the tenders have been received. This will assess whether the project is still affordable and viable or if there is a great deal of extra money to be raised and if it is worth continuing. This is a decision for the full PCC to make, involving any partners who are critical to the success of the project.
- 12.2 There needs to be some very practical and sensible thinking at this stage.
- 12.3 Once you move to the next stage there is no turning back.
- 12.4 In certain circumstances the Finance Committee may ask for the Project to go back to them for further approval before proceeding.

13.0 Construction

- 13.1 If the finance review shows that everything is on track then the project gets the go ahead to build.
- 13.2 Once the project is on site it is essential that the parish have a clear identifiable management structure and process for making decisions. This will ensure that the project is delivered to the agreed cost, time and quality criteria.. Further advice can be sought from the Project Development Manager for your area.

14.0 Operational Matters

- 14.1 While the construction phase is taking place it is essential that all the aspects of operating the new building have been established. It is important to have the funds in place to pay for the new electricity and gas bills and to have the groups or tenants ready to occupy the building.
- 14.2 If the building is to be used for short lets, has the policy regarding this been decided? Draw up terms and conditions, agree deposits and cost of hire. Is there the right furniture? Is the administration in place?

15.0 Completion Review

- 15.1 This is a de brief once the project is complete and it would be good to have all those that were present at the first meeting here again.
- 15.2 This gives an opportunity to see what went well in the process, what didn't and what implications this has for the future running of the site.
- 15.3 It is a very important meeting and should not be ignored as it also allows the experience and learning to be shared with other projects who are about to undertake a similar task.
- 15.4 It is essential to review and adapt the business plan in the light of the experience in running the building.

Appendix

The RIBA Plan of Work is a robust process protocol which describes the activities from appraising the clients requirements through to post construction. The stages are also used in the appointing documents to help identify the architect's services.

A: Appraisal Identification of client's requirements and possible constraints on development. Preparation of studies to enable the client to decide whether to proceed and to select probable procurement method.

B: Strategic Briefing Preparation of Strategic Brief by, or on behalf of, the client confirming key requirements and constraints. Identification of procedures, organisational structure and range of consultants and others to be engaged for the project. [Identifies the strategic brief (as CIB Guide) which becomes the clear responsibility of the client]

C: Outline proposals. Commence development of strategic brief into full project brief. Preparation of outline proposals and estimate of cost. Review of procurement route.

D: Detailed proposals. Complete development of the project brief. Preparation of detailed proposals. Application for full development control approval.

E: Final proposals. Preparation of final proposals for the Project sufficient for co-ordination of all components and elements of the Project.

F: Production information F1: Preparation of production information in sufficient detail to enable a tender or tenders to be obtained. Application for statutory approvals. F2: Preparation of further production information required under the building contract. [Now in two parts, F1 - the production information sufficient to obtain tenders and F2 - the balance required under the building contract to complete the information for construction]

G: Tender documentation. Preparation and collation of tender documentation in sufficient detail to enable a tender or tenders to be obtained for the construction of the Project. [Solely concerned with the documentation required for tenders. Particularly useful with D+B or management contracts]

H: Tender action. Identification and evaluation of potential contractors and/or specialists for the construction of the project. Obtaining and appraising tenders and submission of recommendations to the client.

J: Mobilisation. Letting the building contract, appointing the contractor. Issuing of production information to the contractor. Arranging site handover to the contractor.

K: Construction to Practical Completion. Administration of the building contract up to and including practical completion. Provision to the contractor of further information as and when reasonably required.

L: After Practical completion. Administration of the building contract after practical completion. Making final inspections and settling the final account. [Clearly separated from the construction phase]