



# Church Building Projects: Purpose, Planning, Procurement

**Diocese of Oxford – 11 July 2019**

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# 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](http://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](http://www.parishresources.org.uk) and an email will be sent to you when it is published



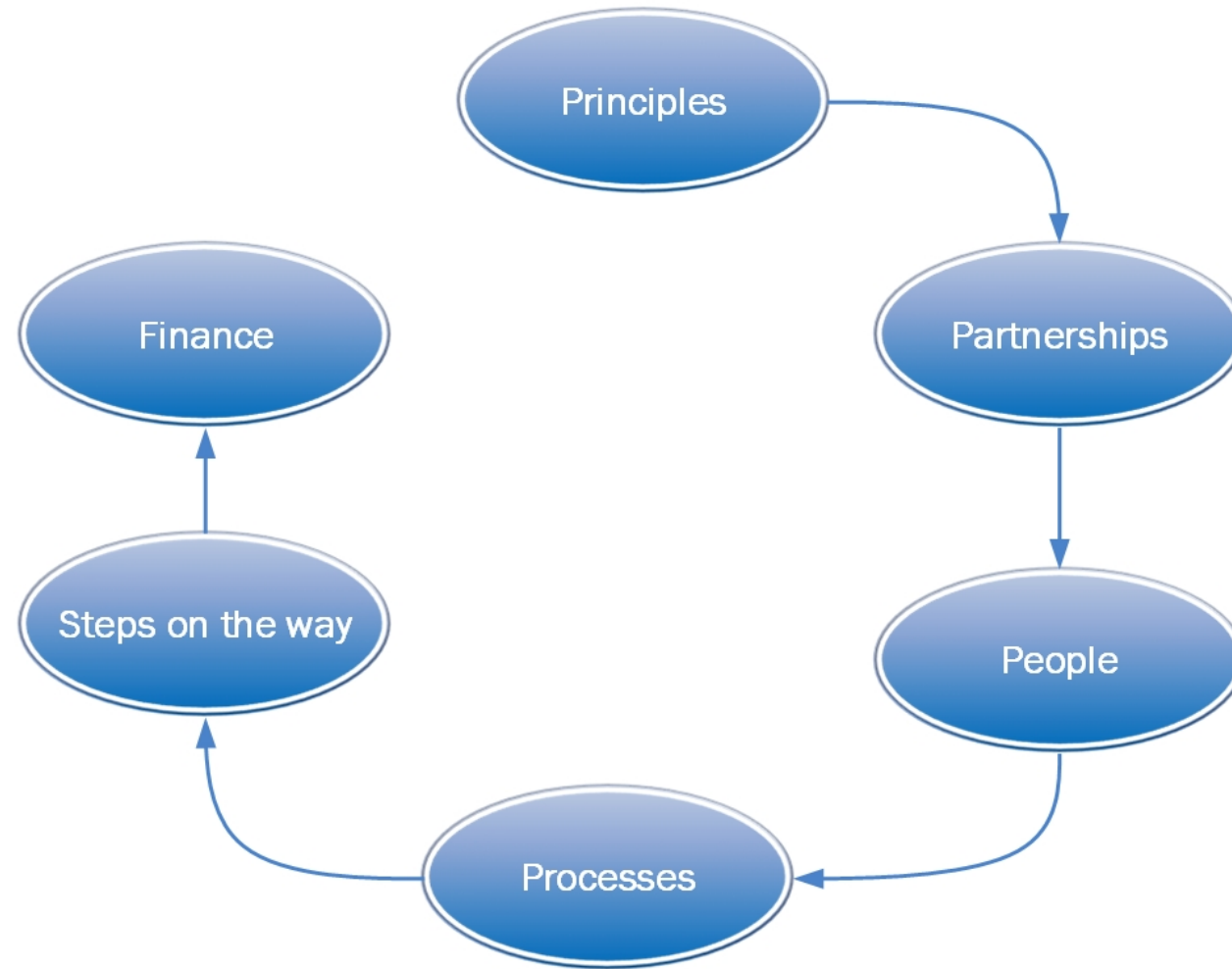


09.30 am	Registration, refreshments
10.00 am	Welcome and introductions
10.25 am	Introduction and session 1: Principles
11.10am	Break, coffee
11.30am	Session 2: Partnerships
12.15pm	Session 3: People
01.00pm	Lunch
01:45pm	Session 4: Processes
02.30pm	Session 5: Steps on the Way
03.00pm-03.15pm	Tea
03.15pm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





How to start - who owns the project – selling your project – section 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 planning – keeping project live – time scales – congregational tittle-tattle – permissions – terminology - funding stages – terms of delegation to building committee – solicitors – grantfinder or fundfinder – Friends Scheme - Legacies – the project manager role – good communications – defining stakeholders – Friends’ Scheme - mission - 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





# CHURCH BUILDING PROJECTS



Purpose  
Planning  
Procurement



Principles

**Commitment**  
**Contribution**  
**Participation**  
**Mission**



Theology



The journey



Purpose



Narrative: story of the building



Design Process



Need to plan



Principles

Partnerships

People

Processes

Steps on the way

Finance





# The Journey

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

[www.parishresources.org.uk/buildingprojects](http://www.parishresources.org.uk/buildingprojects)





....and afterwards

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





# Church Building Projects - Where to Begin...?

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

## 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@archangelic.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](http://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](http://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.

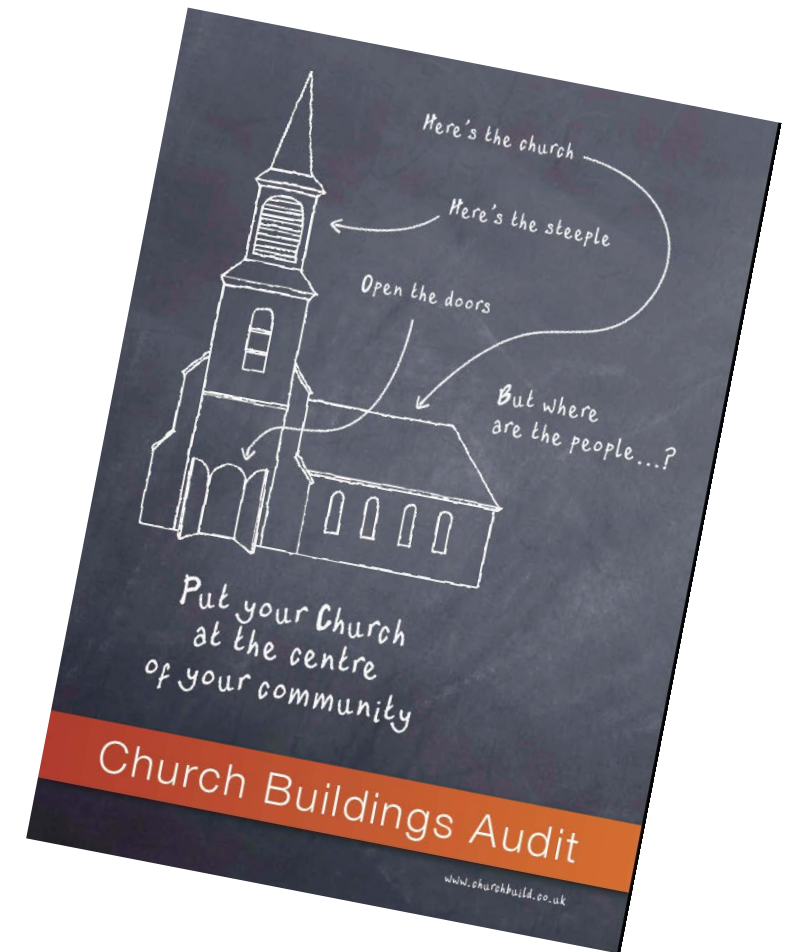
With thanks to Nigel Walter and Jim Hammett, for the material from their website [www.churchbuild.co.uk](http://www.churchbuild.co.uk)





# 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



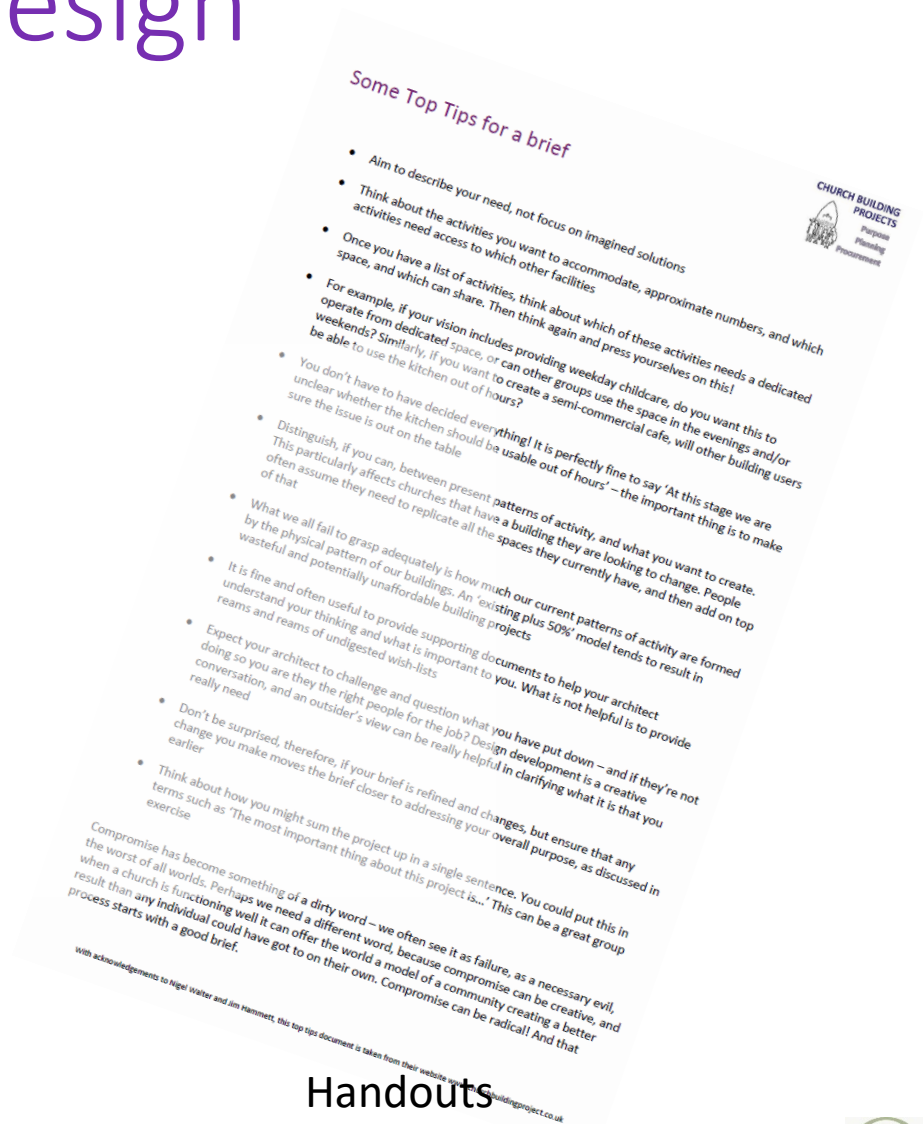
Handouts  
7-14





# 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



# Purpose

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





WE WANT TO HELP YOU



ADVICE AND GUIDANCE

Everything from chairs, churchyards, new works to conservation



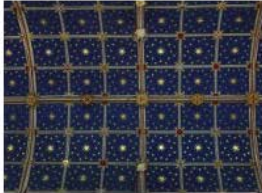
APPLY FOR A GRANT

We give grants for conservation and building repairs



REDUCE YOUR CARBON FOOTPRINT

Our environmental campaign



SUPPORT OUR BUILDINGS

Donate to our building funds or leave a gift in your will



MAKE CHANGES TO YOUR BUILDING

A step-by-step guide to project planning



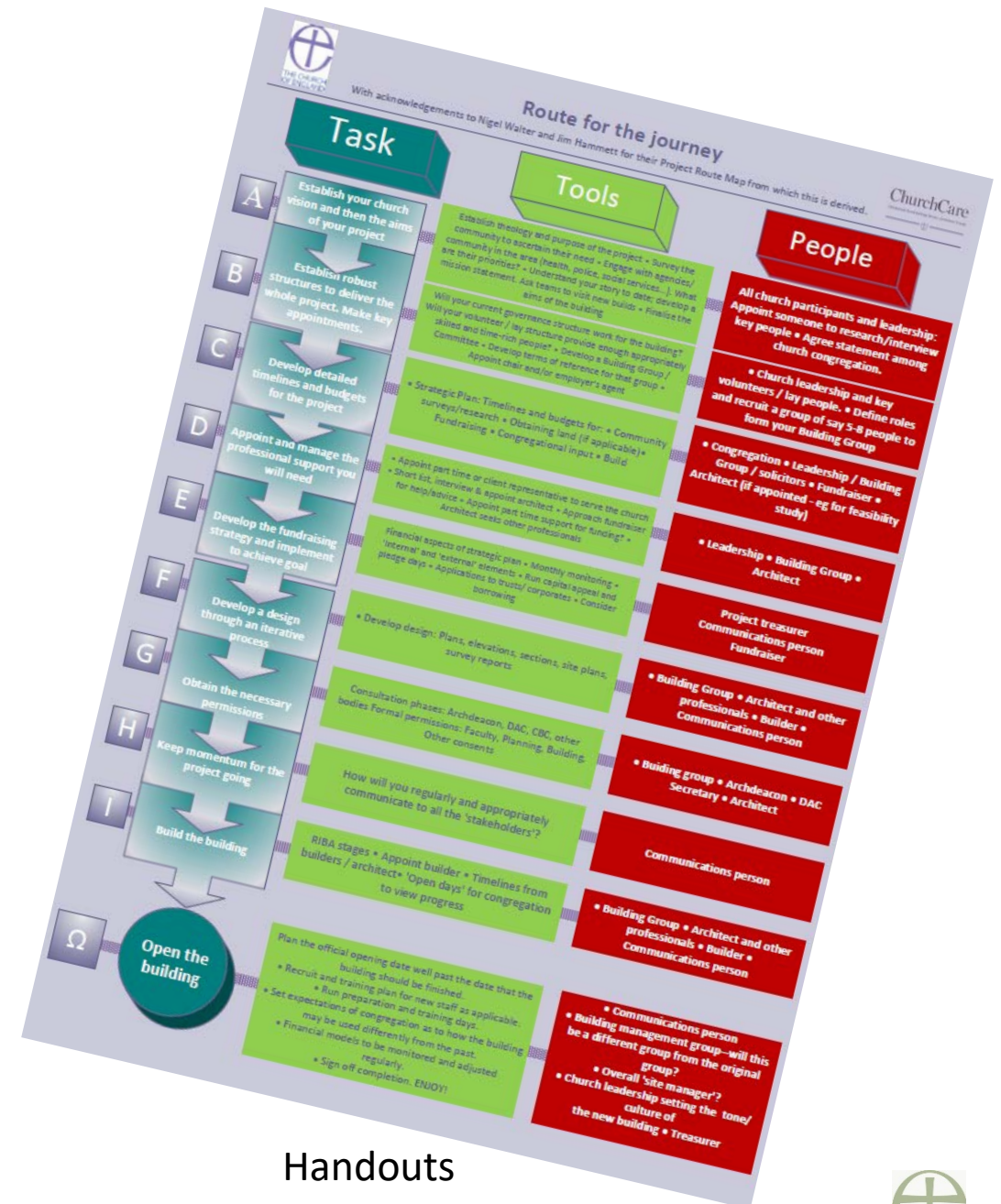
DEVELOP A GROWTH STRATEGY FOR YOUR DIOCESE

Integrate church buildings with your mission and ministry planning



# 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

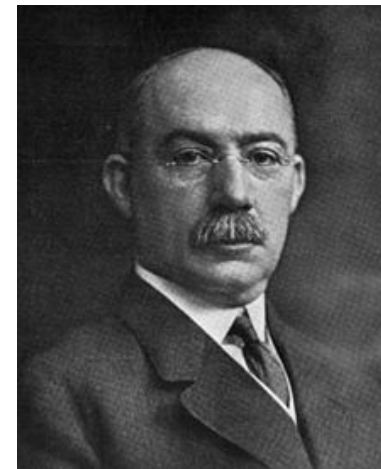


Handouts



# Planning - *Gantt chart*

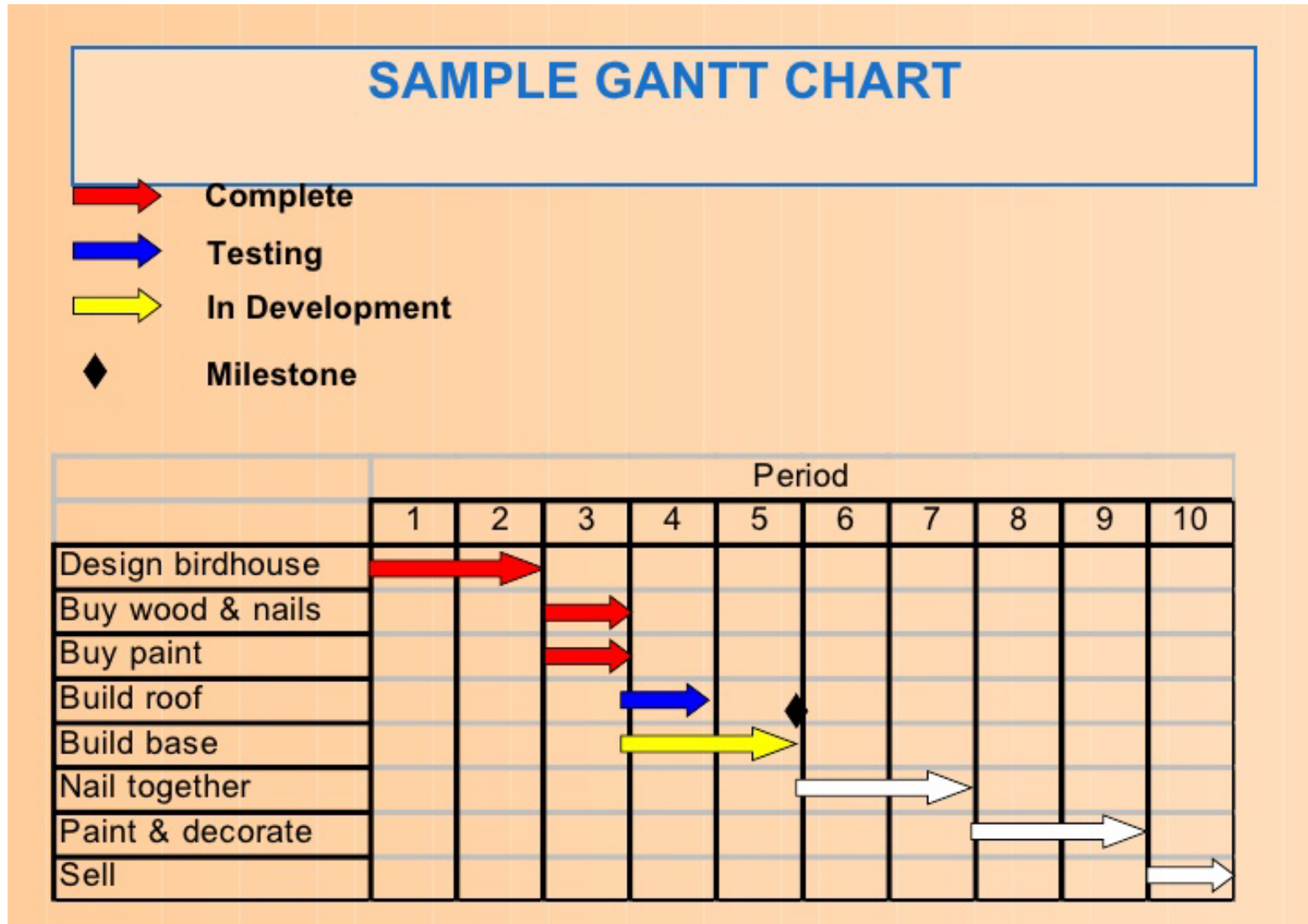
- List of tasks
- Who has to do them
- How long each task takes
- What has to happen first
- What resources you need



Henry Gantt



# Gantt chart – make a bird-table for sale







1.4-Gantt-template (3) [Compatibility Mode] - Excel

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW

Nicolas Jenni

Clipboard Font Alignment Number Styles Cells Editing

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	A	
1	assumed 12 month build time			<b>MONTHS</b>																								
2	<b>TASK AREA</b>			<b>BEFORE</b>																								
3		<b>START</b>	<b>FINISH</b>	<b>OPENING</b>	48	47	46	45	44	43	42	41	40	39	38	37	36	35	34	33	32	31	30	29	28	27	2	
4																												
5	<b>ESTABLISH VISION AND AIMS</b>																											
6	Discuss with congregation	48	44																									
7	Survey community	40	38																									
8	Engage with local agencies	40	37																									
9	Visit other new builds	47	40																									
10	Develop a mission statement	35	33																									
11	Finalise aims of building	33	33																									
12	<b>ESTABLISH STRUCTURES</b>																											
13	Governance structures	32	28																									
14	Develop Terms of ref for Building Group/ Committee	33	30																									
15	Appoint chair and group	33	33																									
16	<b>DEVELOP TIMELINES &amp; BUDGETS</b>																											
17	Develop this Gantt Chart	48	48																									
18	Develop a business/mission plan	32	30																									
19	Develop financial plan	30	30																									
20	<b>APPOINT &amp; MANAGE</b>																											
21	Appoint 'agent' if applicable	30	30																									
22	Appoint architect & othper professionals	28	28																									
23	Appoint fundraising advisor	28	28																									
24	Appoint fundraiser	26	26																									
25	Communicate targets	30	0																									
26	<b>FUNDRAISING</b>																											
27	Enhance financial plan with fundraising details	28	26																									
28	Run capital appeal	24	24																									
29	Monthly pledge appeal	24	24																									
30	Run trust and corporate appeals	20	16																									
31	Communicate progress	28	0																									
32	<b>DESIGN</b>																											
33	Land acquisition	assumed																										
34	Develop plans, elevations, etc...	28	20																									
35	Agree OS castings	20	18																									

<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](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**
- Card readers for contactless receipts and giving
- Stationery, office and facilities management products – free next-day delivery
- LED bulbs from LED Hut – free next-day delivery
- Computer software from Phoenix
- Eventbrite for ticketing
- Church supplies with discount code
- Fire safety from Safelincs



# Purpose

## **Sharing**

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

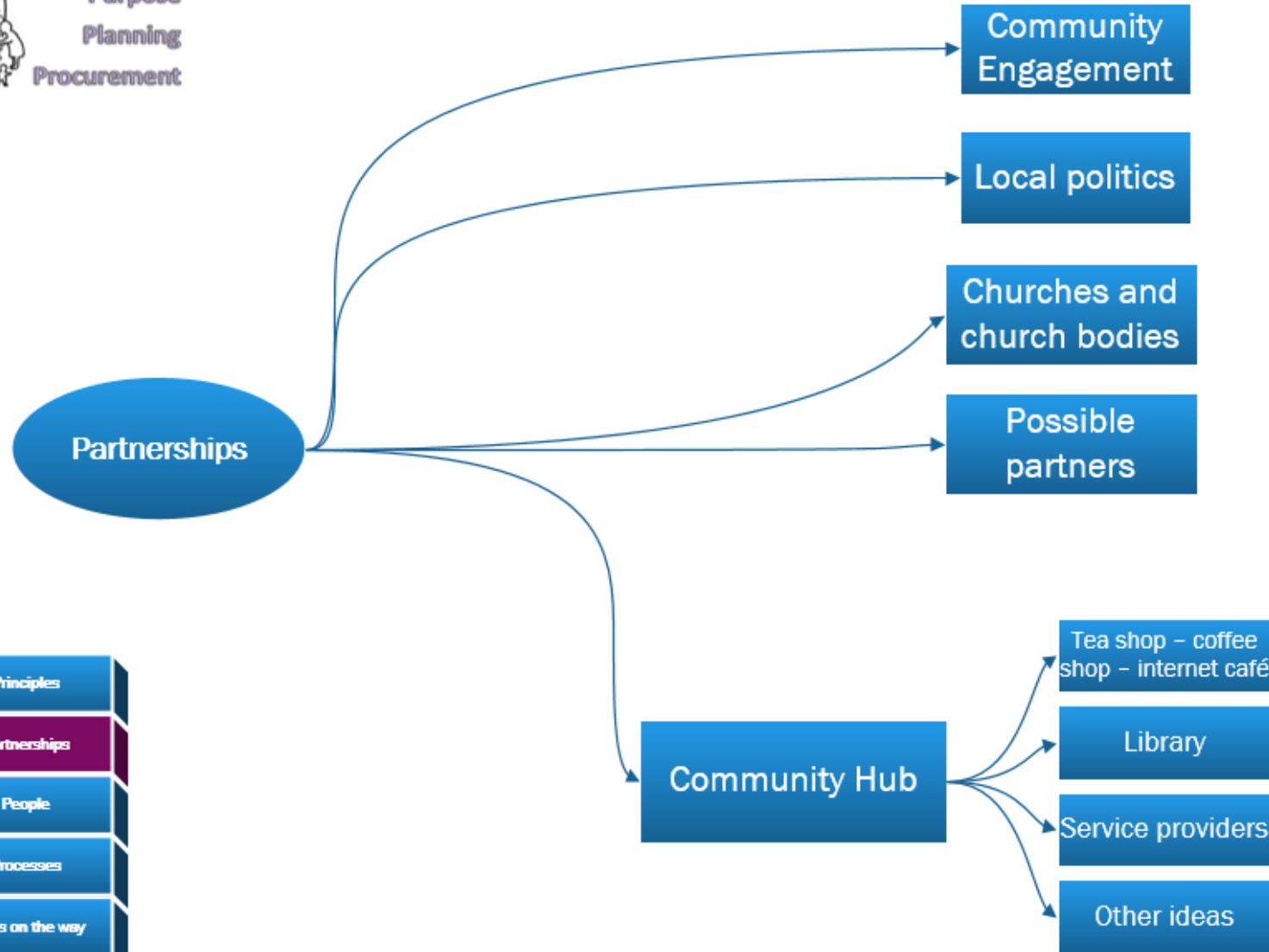




# CHURCH BUILDING PROJECTS



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





# How much do you know about your community?

[www.neighbourhood.statistics.gov.uk](http://www.neighbourhood.statistics.gov.uk)

Office for National Statistics

[www.locality.org.uk](http://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](http://www.local-history.co.uk) [www.gov.uk/search-local-archives](http://www.gov.uk/search-local-archives) [www.nationalarchives.gov.uk](http://www.nationalarchives.gov.uk) [www.visitengland.com](http://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 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 to see in your area?

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

### 4. Finance

Which of the following would you like to see in your area?

1. Community centre
2. Youth club
3. Sports ground
4. Community hall

## YOU WITH A COMMUNITY SURVEY

### 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 of each is available as a handout.
- They also produced the Church of England parish directory which includes information on each parish. A source of information. <https://www.arcgis.com/home/item.html?id=bc079aa09a>



Parishioners at glance

Population 2001 <sup>1</sup>	800
Population 2011 <sup>2</sup>	800
Proportion Christian 2001 <sup>1</sup>	79%
Proportion Christian 2011 <sup>2</sup>	67%

Age Profile (2011<sup>2</sup>)

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

- Demolished
- Grade I?
- Not recorded

- Parishes
- Durham
  - Easington
  - Lanchester
  - Hartlepool
  - Sedgefield
  - Auckland
  - Barnard Castle
  - Darlington
  - Stanhope
  - Stockton
  - Chester-le-Street
  - Gateshead
  - Gateshead West
  - Houghton-le-Spring
  - Jarrow
  - Wearmouth
  - Extra-parochial places



- <http://insight.oxfordshire.gov.uk/cms/joint-strategic-needs-assessment>
- <https://www.buckscc.gov.uk/services/community/research/deprivation/>
- <https://info.westberks.gov.uk/research>
- <http://www.reading.gov.uk/newlocalplan>
- <https://www.cherwell.gov.uk/info/83/local-plans/376/adopted-cherwell-local-plan-2011-2031-part-1>
- <https://www.oxford.gov.uk/info/20264/local-plan/1311/local-plan-2016-2036>
- <https://www.milton-keynes.gov.uk/planning-and-building/plan-mk>

<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](https://www.planningportal.co.uk/info/200126/applications/70/community_infrastructure_levy)





# Purpose

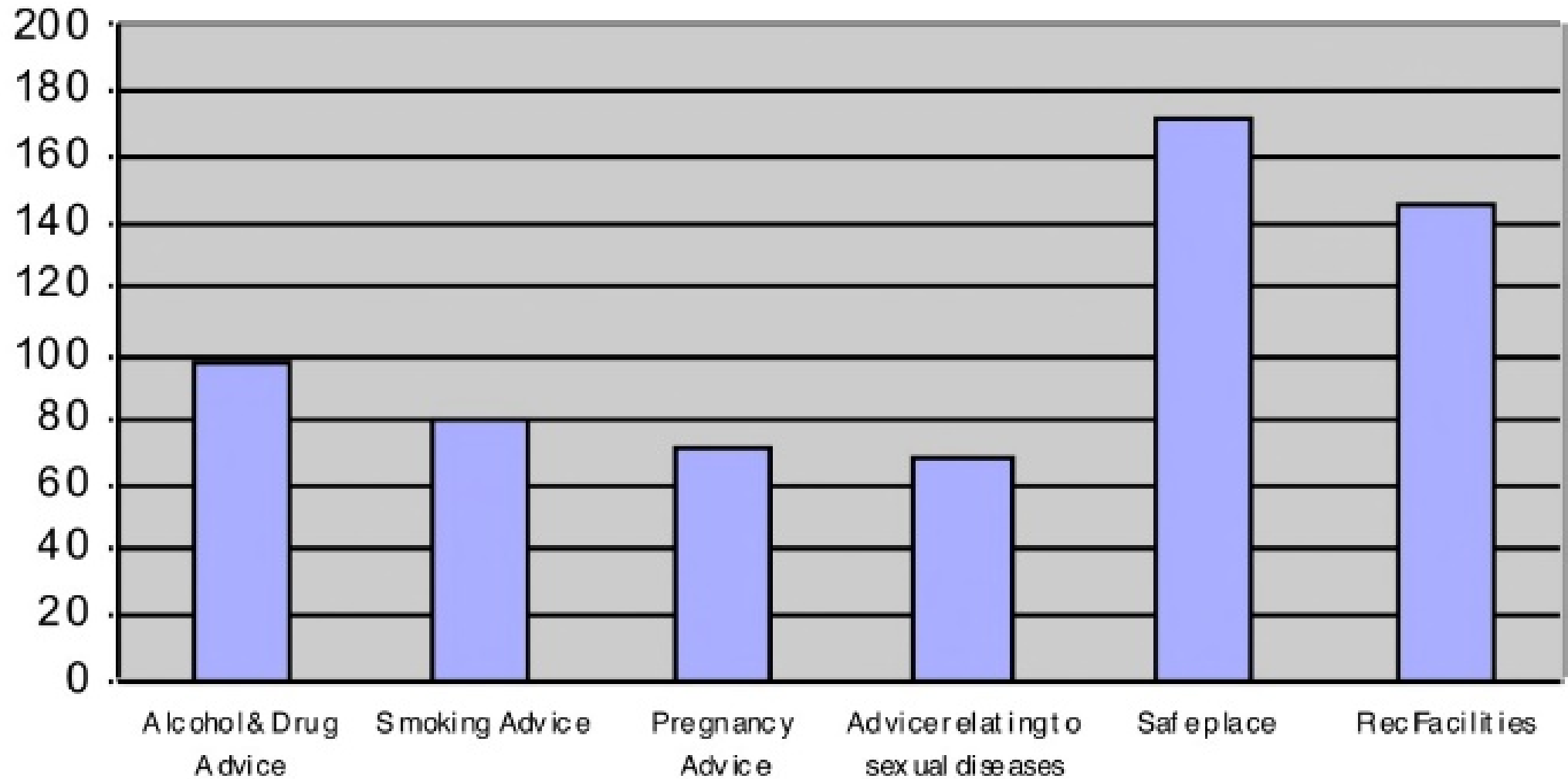
## **Sharing**

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





## People saying "Yes" to Young People Issues



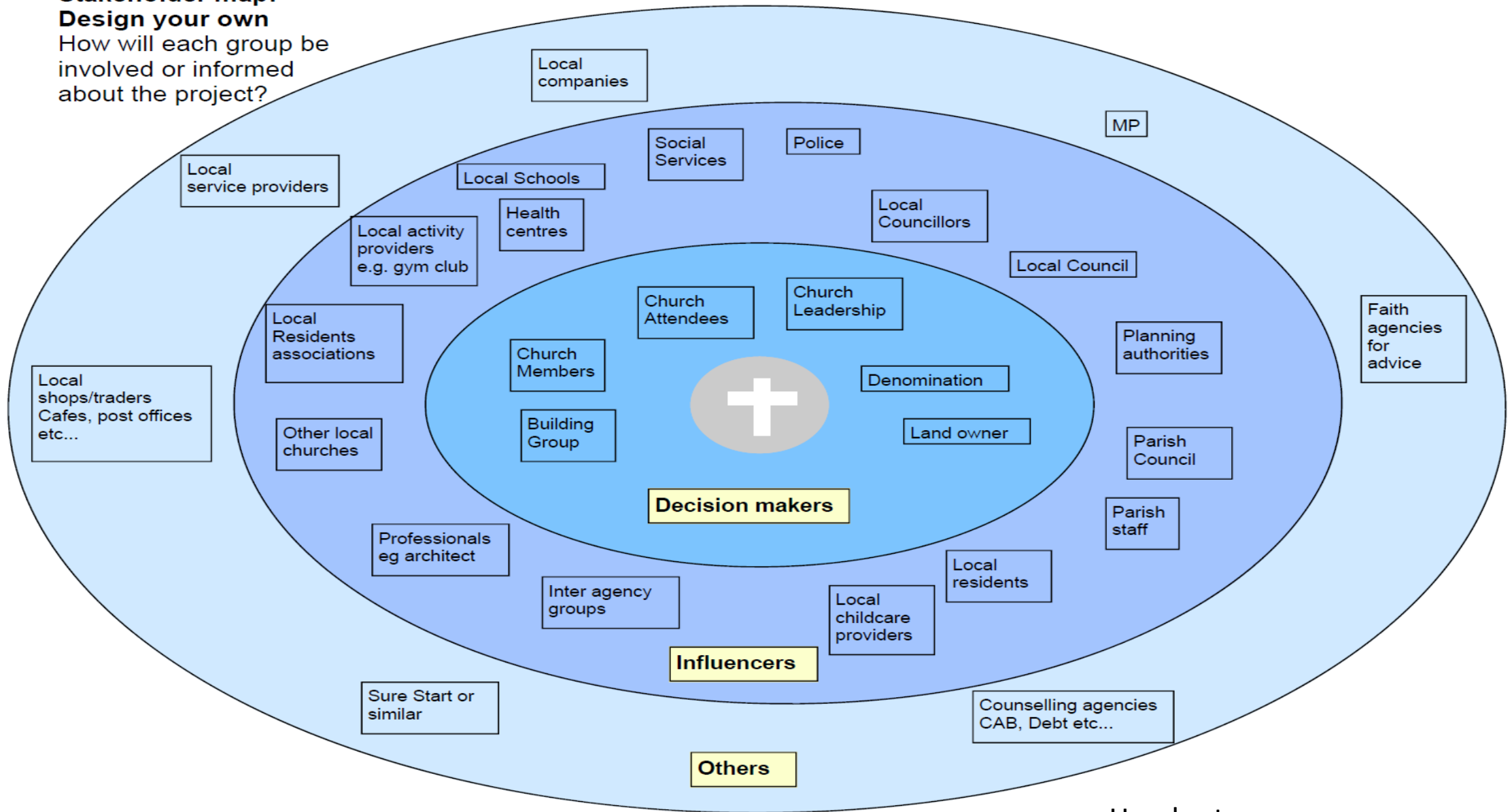




### Stakeholder map:

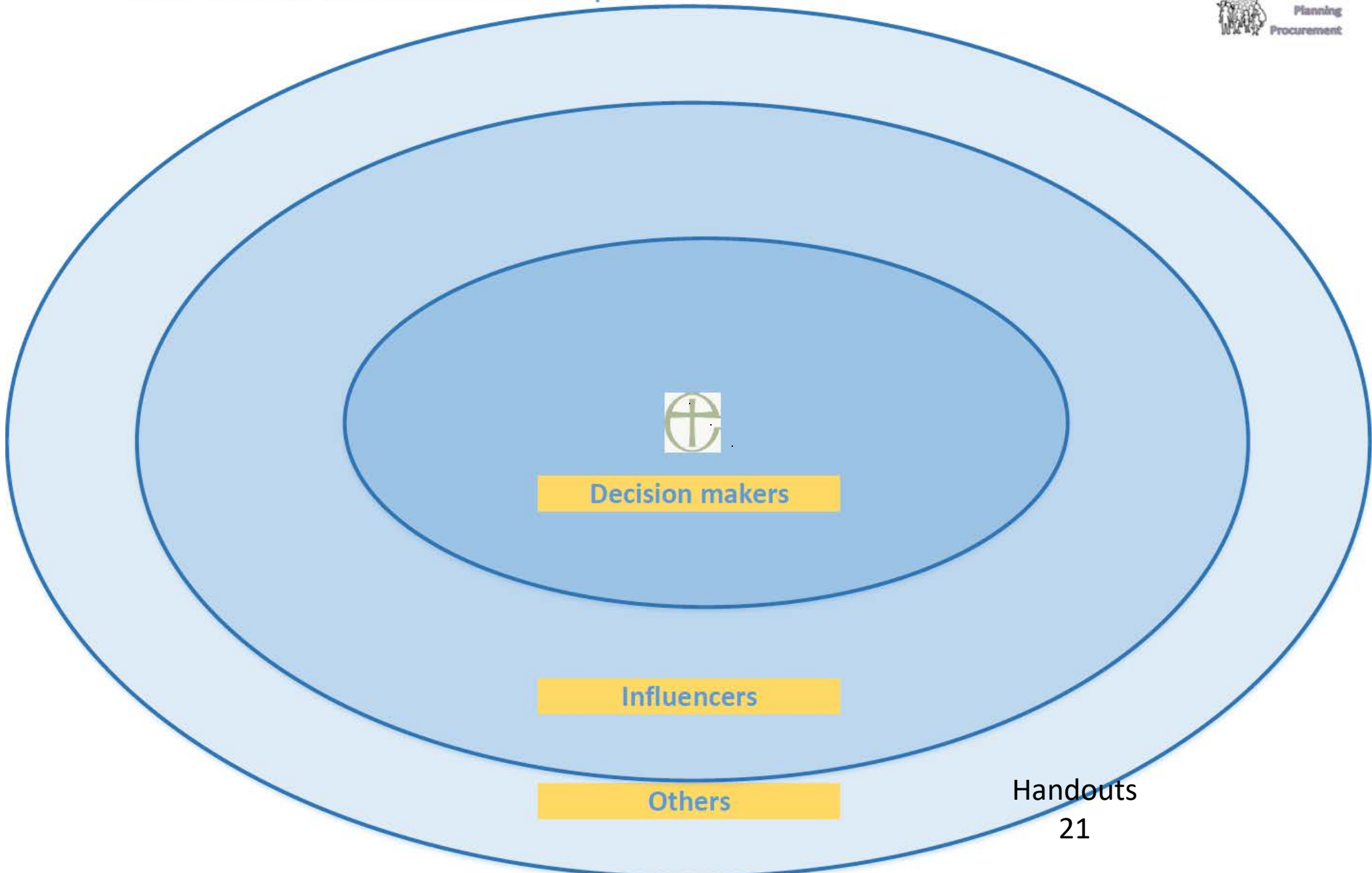
#### Design your own

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/>

The screenshot displays the Citizens UK website's 'Joining Citizens UK as an Institution' page. The navigation bar at the top includes links for 'ABOUT US', 'TAKE ACTION NOW', 'NEWS', 'GET INVOLVED', 'LOCAL CHAPTERS', and a 'SIGN IN' button. The main heading is 'Joining Citizens UK as an Institution'. Below this, the text states: 'Citizens UK is a group of hundreds of churches, schools, mosques, unions & other civil society organisations working for the common good. Each of these member groups pays annual dues to Citizens UK.' It then asks 'Here's how your organisation can join:' and lists the first step: '1. Watch this video to see whether this is the sort of alliance your organisation would want to join:'. A video player is embedded, showing a video titled 'Citizens UK - What is Community Organising?'. Below the video, the second step is '2. Contact us using the form below, including the location of the organisation itself.' and the third step is '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)'. On the right sidebar, there is a 'Sign up' section with a 'SIGN UP WITH FACEBOOK' button, an 'OR' separator, a 'SIGN UP WITH TWITTER' button, and a link 'Or sign up by email'. Below this is a Facebook Like Page widget for 'Citizens UK' with 6,408 likes and a 'Follow @CitizensUK' button.





# 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](http://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/>

<https://www.churchofengland.org/more/church-resources/churchcare/advice-and-guidance-church-buildings/sharing-your-building>

<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/outlook/churchbuildings\\_winter2013.pdf](https://www.canterburydiocese.org/media/outlook/churchbuildings_winter2013.pdf)



## Case studies from Churchcare

[Café - St John Hackney](#)

[Café - All Saints Northampton](#)

[Café, gift shop, florist and children's play area - St James, West Hampstead](#)

[Children's centre - Springfield project, Birmingham](#)

[Community arts venue - St Mary Ashford](#)

[Community room and IT centre - St Mary Stannington](#)

[Community space - St Peter Swainstrophe](#)

[GP surgery and community complex - St Cuthbert Copnor](#)

[Meeting room and gallery space - St Peter Notting Hill](#)

[Music venue - St Oswald Guiseley](#)

[Post office - St Mary Cloughton](#)

[Village shop - St Giles Langford](#)

[Visitor centre, arts and drama - St Mary the Virgin Ashford](#)

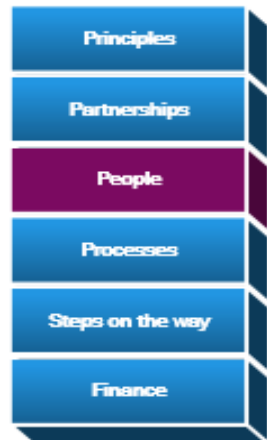
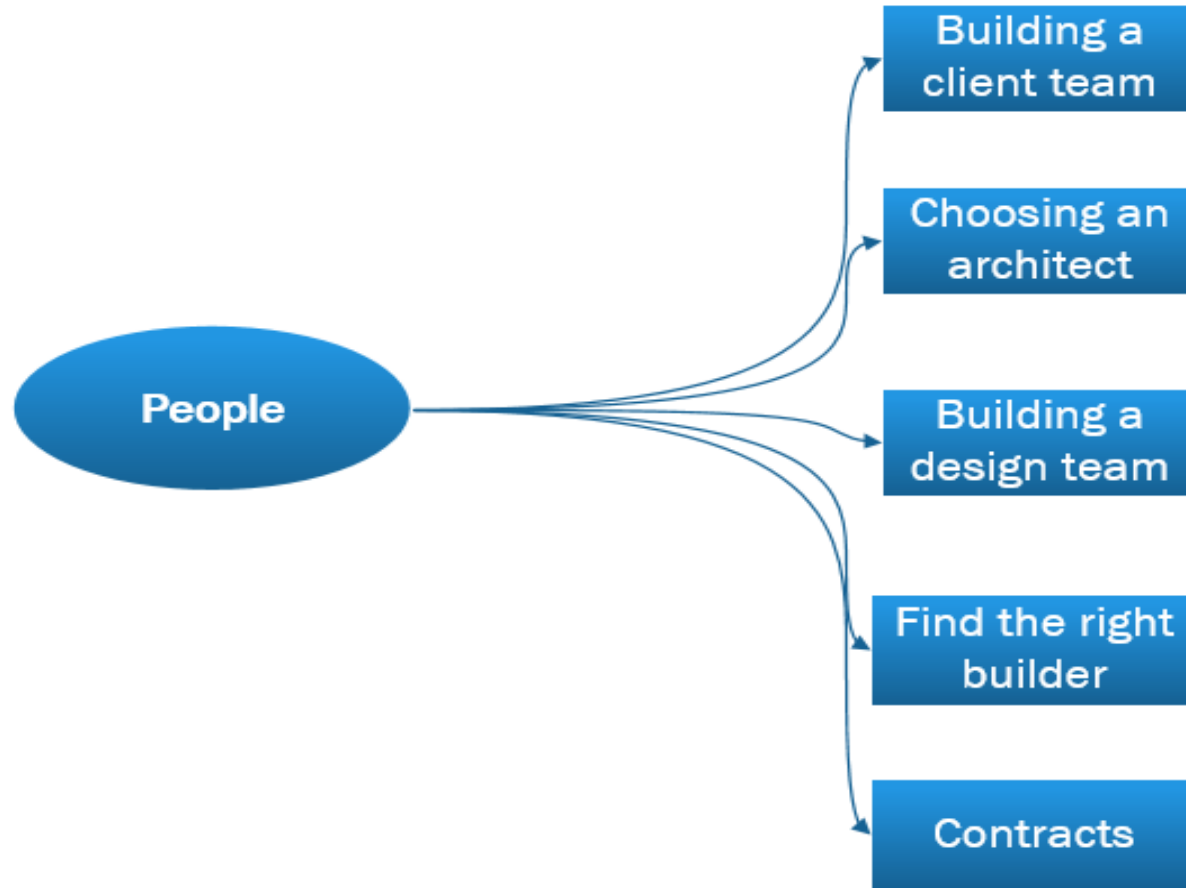




# CHURCH BUILDING PROJECTS



Purpose  
Planning  
Procurement



# Building a client team

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





# 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/>  
<https://ocva.org.uk/volunteer-centre-oxfordshire/>  
<https://volunteering.oxfordshire.gov.uk/cms/>  
<https://www.cherwell.gov.uk/info/118/communities/295/voluntary-and-community-organisations/2>  
<http://rva.org.uk/volunteering/>  
<https://communityactionmk.org/volunteering/>

But 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 Procurement

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 objective 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 stage

#### Tendering

For people respond to interview

For 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 (!) and have much in common across building types, but if your church is a historic one then you must 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

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

**Design Team – what do they do?**

**Architect**  
This is usually the first appointment, and is dealt with in a bit more detail in 'Choosing an Architect'. 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. Trust and personality fit are very important; think of them as your critical friend.

**Principal Designer**  
Deals with Health and Safety compliance, during design development, while on site, and once the building is in operation (eg how easy is to clean the high level windows?). As client, you have some serious responsibilities under the Construction Design and Management legislation, and the Principal Designer helps you fulfil these responsibilities. This appointment should be made as soon as is practicable after the feasibility stage.

**Quantity Surveyor**  
A QS can help you with the financial management of the project. At the very least you should have an initial budget prepared on the basis of outline designs, and then refine this as more information becomes available; much better to invest in this information at an early stage than to have a nasty shock further down the line when money has been spent on professional fees etc for something that may not be affordable. A QS can also prepare a full 'Bill of Quantities' at tender stage to describe the works in full financial detail for each tenderer to price against, but this can be decided further down the line.

**Structural Engineer**  
Designs the structural elements, eg beams and columns, foundations, and sometimes the underground drainage. If the design of the building is significantly affected by the structure (eg a particular design for the support of the roof) then the Structural Engineer should be involved in the early stages of design development; if not, then this appointment would follow the granting of planning permission.

**Services Engineer**  
Designs the right heating system for the space and its occupancy pattern, the right lighting levels, the right ventilation etc. Again this usually follows the planning stage.

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**CHURCH BUILDING PROJECTS**  
Purpose  
Planning  
Procurement



# 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](http://www.citb.co.uk/cdmregs)

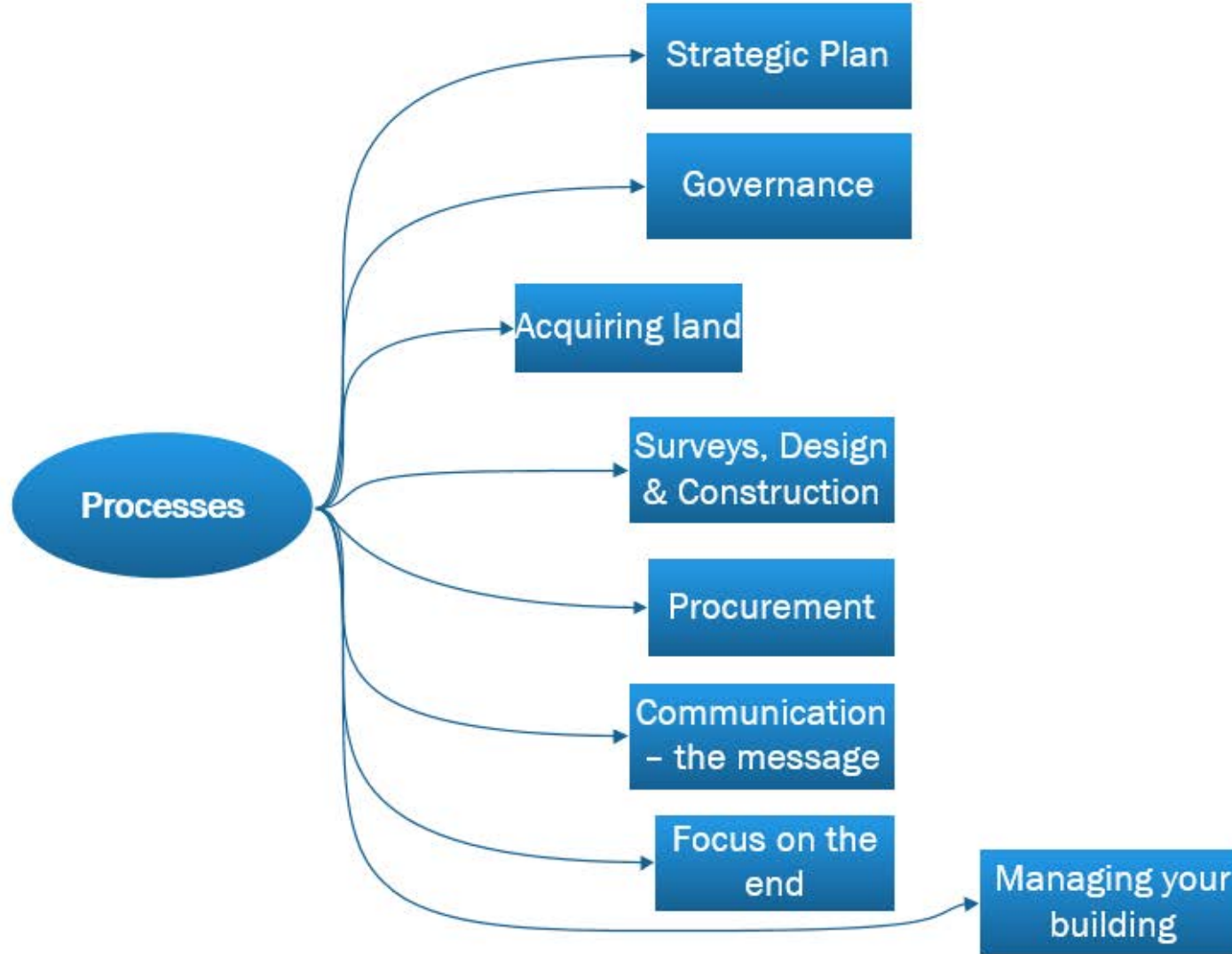




# CHURCH BUILDING PROJECTS



Purpose  
Planning  
Procurement





# Strategic Plan

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

**CHURCH BUILDING PROJECTS**  
Purpose  
Planning  
Procurement

## Strategic Plan for your church project

Here are some suggestions to help with developing the headings:

1. **Vision statement** (about the wider church mission) – a short statement that is inspirational as well as aspirational. It may use words like 'transforming' or 'improving'. Try and let it cover the who, why, where and what of the church.
2. **Mission statement** – describes what you want to achieve in a little more detail. Maybe highlighting certain target groups of people who the church is trying to serve.
3. Include a **diagram of the reporting structure** and governance structure for the project. How will decisions be made and who makes them. You may include terms of reference for your Building committee/group.
4. **Strategy** – Explain the church's strategy and how the building development fits in with that. This might use specific SMART (Specific, Measurable, Achievable, Realistic and Timed) objectives. It can be helpful to summarise this in table form, with the following against each item:
  - **Key result area** – eg 'Develop a costed plan for the build'
  - **Who is responsible for this action** – e.g. 'Church Treasurer'
  - **By when** – (Date)
5. Develop a **detailed financial spreadsheet** to project future income and expenditure, cashflow and balances over at least 3-5 years. Include at least 12 months after the building development has fully opened so it shows how sustainable the project is. (You will want to know that and so will potential funders/donors).

<b>S</b>	<b>SPECIFIC</b>	Details exactly what needs to be done
<b>M</b>	<b>MEASURABLE</b>	Achievement or progress can be measured
<b>A</b>	<b>ACHIEVABLE</b>	Objective is accepted by those responsible for achieving it
<b>R</b>	<b>REALISTIC</b>	Objective is possible to attain (important for motivational effect)
<b>T</b>	<b>TIMED</b>	Time period for achievement is clearly stated

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Page | 1

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](http://www.doodle.com)

## Documents

- [www.dropbox.com](http://www.dropbox.com)
- [www.google.co.uk/docs/](http://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?
- Consecration lines
- 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

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

**THE CHURCH OF ENGLAND** Church Heritage Record

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

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 exeGesIS 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

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.

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**Year / Date:**

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**Copyright:**

**Description:**

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





# Project route map: 8 RIBA stages, 0-7



RIBA

The RIBA Plan of Work 2013 organises the process of briefing, designing, constructing, maintaining, operating and using building projects into a number of key stages. The content of stages may vary or overlap to suit specific project requirements. The RIBA Plan of Work 2013 should be used solely as guidance for the preparation of detailed professional services contracts and building contracts.

www.ribaplanofwork.com

Stages	0	1	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
<b>Core Objectives</b>	Identify client's <b>Business Case and Strategic Brief</b> and other core project requirements.	Develop <b>Project Objectives</b> , including <b>Quality Objectives and Project Outcomes</b> , <b>Sustainability Aspirations</b> , <b>Project Budget</b> , other parameters or constraints and develop <b>Initial Project Brief</b> . Undertake <b>Feasibility Studies</b> and review of <b>Site Information</b> .	Prepare <b>Concept Design</b> , including outline proposals for structural design, building services systems, outline specifications and preliminary <b>Cost Information</b> along with relevant <b>Project Strategies</b> in accordance with <b>Design Programme</b> . Agree alterations to brief and issue <b>Final Project Brief</b> .	Prepare <b>Developed Design</b> , including coordinated and updated proposals for structural design, building services systems, outline specifications, <b>Cost Information</b> and <b>Project Strategies</b> in accordance with <b>Design Programme</b> .	Prepare <b>Technical Design</b> in accordance with <b>Design Responsibility Matrix</b> and <b>Project Strategies</b> to include all architectural, structural and building services information, specialist subcontractor design and specifications, in accordance with <b>Design Programme</b> .	Offsite manufacturing and onsite <b>Construction</b> in accordance with <b>Construction Programme</b> and resolution of <b>Design Queries</b> from site as they arise.	Handover of building and conclusion of <b>Building Contract</b> .	Undertake <b>In Use</b> services in accordance with <b>Schedule of Services</b> .
<b>Procurement</b> *Variable task bar	Initial considerations for assembling the project team.	Prepare <b>Project Roles Table</b> and <b>Contractual Tree</b> and continue assembling the project team.	The procurement strategy does not fundamentally alter the progression of the design or the level of detail prepared at a given stage. However, <b>Information Exchanges</b> will vary depending on the selected procurement route and <b>Building Contract</b> . A bespoke <b>RIBA Plan of Work 2013</b> will set out the specific tendering and procurement activities that will occur at each stage in relation to the chosen procurement route.		Administration of <b>Building Contract</b> , including regular site inspections and review of progress.		Conclude administration of <b>Building Contract</b> .	
<b>Programme</b> *Variable task bar	Establish <b>Project Programme</b> .	Review <b>Project Programme</b> .	Review <b>Project Programme</b> .	The procurement route may dictate the <b>Project Programme</b> and may result in certain stages overlapping or being undertaken concurrently. A bespoke <b>RIBA Plan of Work 2013</b> will clarify the stage overlaps. The <b>Project Programme</b> will set out the specific stage dates and detailed programme durations.				
<b>(Town) Planning</b> *Variable task bar	Pre-application discussions.	Pre-application discussions.	Planning applications are typically made using the Stage 3 output. A bespoke <b>RIBA Plan of Work 2013</b> will identify when the planning application is to be made.					
<b>Suggested Key Support Tasks</b>	Review <b>Feedback</b> from previous projects.	Prepare <b>Handover Strategy and Risk Assessments</b> . Agree <b>Schedule of Services, Design Responsibility Matrix and Information Exchanges</b> and prepare <b>Project Execution Plan</b> including <b>Technology and Communication Strategies</b> and consideration of <b>Common Standards</b> to be used.	Prepare <b>Sustainability Strategy, Maintenance and Operational Strategy</b> and review <b>Handover Strategy and Risk Assessments</b> . Undertake third party consultations as required and any <b>Research and Development</b> aspects. Review and update <b>Project Execution Plan</b> . Consider <b>Construction Strategy</b> , including offsite fabrication, and develop <b>Health and Safety Strategy</b> .	Review and update <b>Sustainability, Maintenance and Operational and Handover Strategies and Risk Assessments</b> . Undertake third party consultations as required and conclude <b>Research and Development</b> aspects. Review and update <b>Project Execution Plan</b> , including <b>Change Control Procedures</b> . Review and update <b>Construction and Health and Safety Strategies</b> .	Review and update <b>Sustainability, Maintenance and Operational and Handover Strategies and Risk Assessments</b> . Prepare and submit Building Regulations submission and any other third party submissions requiring consent. Review and update <b>Project Execution Plan</b> . Review <b>Construction Strategy</b> , including sequencing, and update <b>Health and Safety Strategy</b> .	Review and update <b>Sustainability Strategy</b> and implement <b>Handover Strategy</b> , including agreement of information required for commissioning, training, handover, asset management, future monitoring and maintenance and ongoing compilation of <b>'As-constructed' Information</b> . Update <b>Construction and Health and Safety Strategies</b> .	Carry out activities listed in <b>Handover Strategy</b> including <b>Feedback</b> for use during the future life of the building or on future projects. Updating of <b>Project Information</b> as required.	Conclude activities listed in <b>Handover Strategy</b> including <b>Post-occupancy Evaluation</b> , review of <b>Project Performance, Project Outcomes and Research and Development</b> aspects. Updating of <b>Project Information</b> , as required, in response to ongoing client <b>Feedback</b> until the end of the building's life.
<b>Sustainability Checkpoints</b>	Sustainability Checkpoint – 0	Sustainability Checkpoint – 1	Sustainability Checkpoint – 2	Sustainability Checkpoint – 3	Sustainability Checkpoint – 4	Sustainability Checkpoint – 5	Sustainability Checkpoint – 6	Sustainability Checkpoint – 7
<b>Information Exchanges</b> (at stage completion)	<b>Strategic Brief</b> .	<b>Initial Project Brief</b> .	<b>Concept Design</b> including outline structural and building services design, associated <b>Project Strategies</b> , preliminary <b>Cost Information</b> and <b>Final Project Brief</b> .	<b>Developed Design</b> , including the coordinated architectural, structural and building services design and updated <b>Cost Information</b> .	Completed <b>Technical Design</b> of the project.	<b>'As-constructed' Information</b> .	Updated <b>'As-constructed' Information</b> .	<b>'As-constructed' Information</b> updated in response to ongoing client <b>Feedback</b> and maintenance or operational developments.
<b>UK Government Information Exchanges</b>	Not required.	Required.	Required.	Required.	Not required.	Not required.	Required.	As required.

\*Variable task bar – In creating a bespoke project or practice specific RIBA Plan of Work 2013 via www.ribaplanofwork.com a specific bar is selected from a number of options.

## 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 clearly. It's about defining the scope 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. You want to have someone who looks at your need and set of drawings and a specification, a presenter, with suitable skills and experience.

**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 professionals should not be the only criteria for selection.

As an initial rough guide, the RIBA suggests that you should allow 10% overall for your professional costs for a new building project. Fees will vary on work to existing buildings, because there are more decisions to be made here than in designing a new building. For works to existing buildings there is still more to think about and co-ordinate, and more time to liaise with and get approval.

**Handouts 26-27**

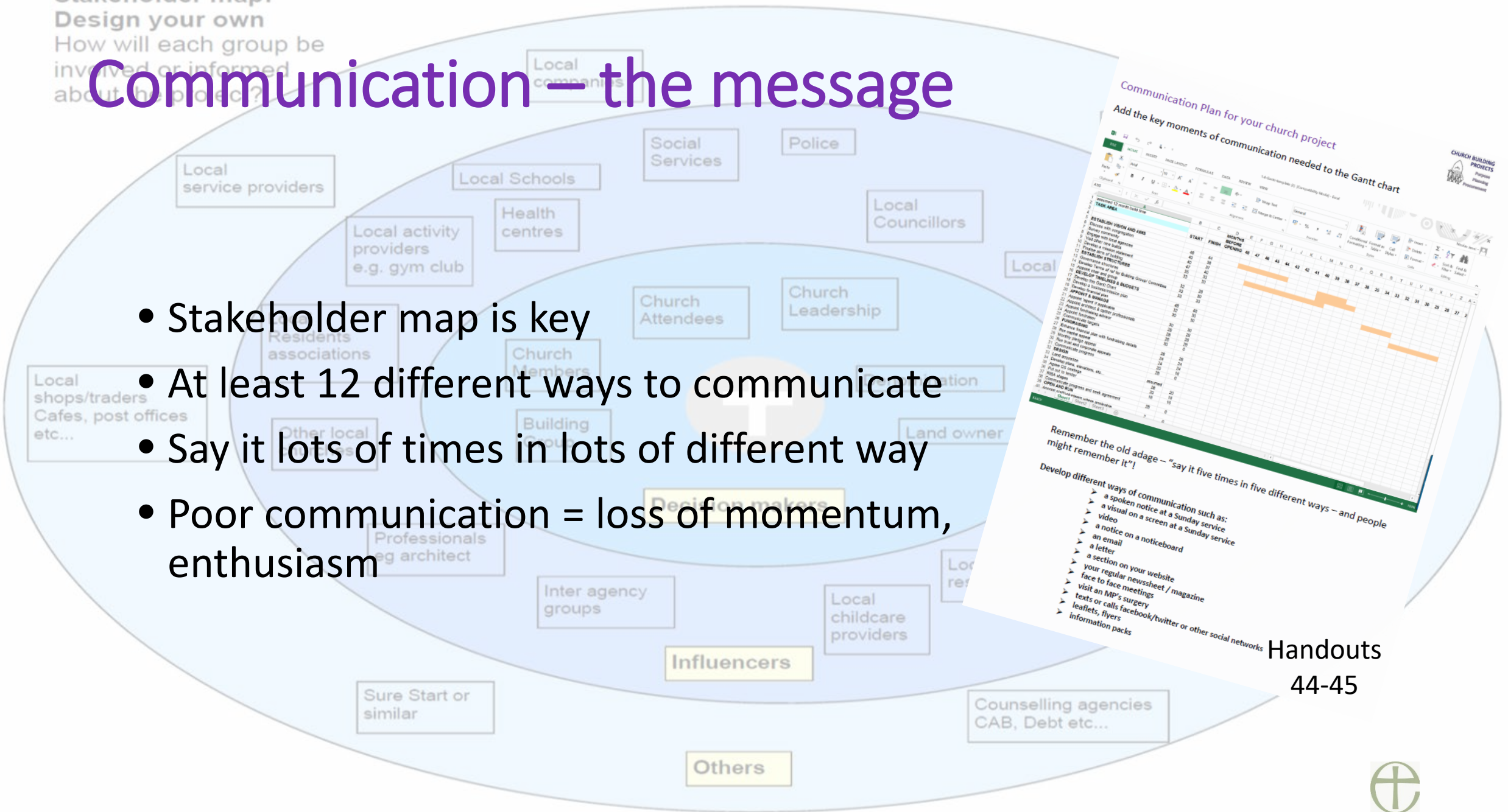
**Handouts 42-43**



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



Communication Plan for your church project  
 Add the key moments of communication needed to the Gantt chart

Remember the old adage – “say it five times in five different ways – and people might remember it”!

Develop different ways of communication – and people

- a spoken notice at a Sunday service
- a video on a screen at a Sunday service
- a notice on a noticeboard
- an email
- a letter
- a section on your website
- your regular newssheet / magazine
- face to face meetings
- visit an MP’s surgery
- texts or calls facebook/twitter or other social networks
- leaflets, flyers
- information packs

Handouts  
 44-45



# Purpose

## **Sharing**

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







# 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

	KNOWN CYCLE	COST per CYCLE	ANNUAL COST	Year Intervals											COST over 30 YEARS
				2	5	10	15	20	25	30	other				
<b>REGULAR MAINTENANCE</b>															
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
<b>Total</b>			<b>6,355</b>												<b>190,650</b>

<b>CAPITAL REPAIRS</b>				<b>When work will be required</b>											
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
<b>Total</b>			<b>11,799</b>												<b>354,000</b>

<b>IMPROVEMENTS &amp; NEW WORKS</b>				<b>Project Target Completion</b>											
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		*	*	*	*	*	*	*		*		
<b>Total</b>			<b>16,700</b>												

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

Handouts

51

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





## 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

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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
<b>Total</b>			<b>6,355</b>									<b>190,650</b>

<b>CAPITAL REPAIRS</b>				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
<b>Total</b>			<b>11,799</b>									<b>354,000</b>

<b>IMPROVEMENTS &amp; NEW WORKS</b>				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		*							
<b>Total</b>			<b>16,700</b>									

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



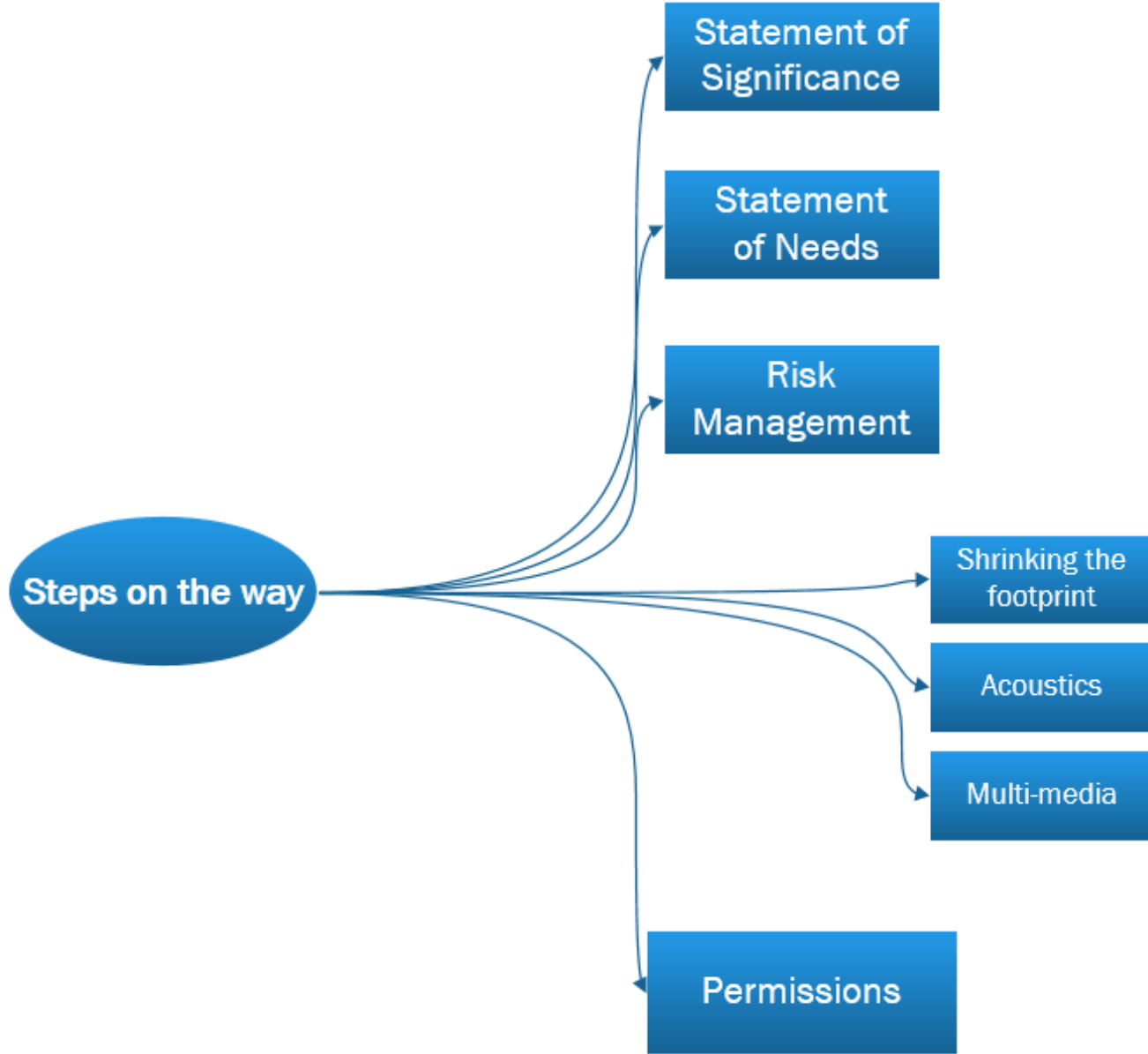


# CHURCH BUILDING PROJECTS



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**

CHURCH BUILDING PROJECTS  
Purpose  
Planning  
Permitted

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





[https:// www.churchofengland.org/more/church-resources/ churchcare/advice-and-guidance-church-buildings/statements-significance-and-needs](https://www.churchofengland.org/more/church-resources/churchcare/advice-and-guidance-church-buildings/statements-significance-and-needs)



THE CHURCH OF ENGLAND  
A CHRISTIAN PRESENCE IN EVERY COMMUNITY

OUR FAITH | LIFE EVENTS | FAITH IN ACTION | PRAYER AND WORSHIP | ABOUT | **MORE +**

HOME > MORE > CHURCH RESOURCES > CHURCHCARE > ADVICE AND GUIDANCE FOR CHURCH BUILDINGS

# Statements of significance and needs

## Church resources

### ChurchCare

Advice and guidance for church buildings

▶ Cathedral Fabric Commission

▶ Church Buildings Council

ChurchCare campaigns

ChurchCare events

ChurchCare news

Conservation committees

Contact the Cathedral and Church Buildings division

▶ Making changes to your building and churchyard

▶ Our conservation grants

[WHAT IS A STATEMENT OF SIGNIFICANCE?](#)

[MAJOR CHURCHES](#)

[WHAT IS A STATEMENT OF NEEDS?](#)

[MAJOR PROJECTS](#)

[WHY ARE STATEMENTS OF SIGNIFICANCE AND NEEDS IMPORTANT?](#)

If your church is listed, then you need to write a statement of significance and needs to apply for faculty.

We can help you focus on what's important.

## Download our guidance

[Statement of significance and needs](#)

[Statement of significance and needs template](#)

[Statement of significance and needs for major projects](#)

[Statement of significance and needs for major projects template](#)



# Statement of Needs

- Good advice on available on <https://www.churchofengland.org/more/church-resources/churchcare/advice-and-guidance-church-buildings/statements-significance-and-needs>
- 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

**CHURCH BUILDING PROJECTS**  
Purpose Planning Procurement

## Statements of Needs

### What Is A Statement Of Needs? (And When Do I Need One?)

If you have a listed church building to which you want to make changes, then you use the Statement of Needs to set out the thinking behind the proposed alterations. However, the process of producing a Statement of Needs is useful for any church considering a building project.

The danger with any project is that the detail that they can sometimes face (stakeholders) will not be as far advanced behind the proposals. A Statement of Needs can help to fill the information gap while at the same time with a Statement of Significance (as of A4), and refer to other historic building, it is essential for significance.

**Guidance Note**  
**Statements of Significance and Statements of Needs**

**ChurchCare**  
16,000 buildings. One resource



**Possible Structure:**

1. **Your Needs:** A brief in terms of fabric, the room should 'WCs'; in terms of the building, or what you can
2. **The Benefit:** what you can
3. **The Vision:** church in
4. **The Footprint:** term run lettings maintr impa
5. **The Activity:** activ
6. **Timeline:** TI €
7. **Cost:** €
8. **Other:** Other

**Statement of Significance**

The Faculty Jurisdiction Rules 2013 define a Statement of Significance as "a document which describes the significance of the church or other building in terms of its special architectural and historic interest (including any contribution made by its setting) and any significant features of artistic or archaeological interest that the church or other building has so as to enable the potential impact of the proposals on its significance, and on any such features, to be understood".

A Statement of Significance is an important tool to help everyone understand the significance of the church building and its fabric and fittings.

It is a useful resource for anyone with responsibility for your churches fabric and encourages good stewardship of your heritage building.

It should be prepared independently of any Faculty application, and ideally reviewed annually so that any recently obtained historical material or changes, such as an extension or reordering, can be incorporated, and a copy should be given to the Church Architect to include in his Quinquennial Inspection Report.

A Statement of Significance should accompany every faculty application that involves making changes to a listed church. It will help

This form should be used for all projects other than very complex ones. For major complex projects an expanded version of this form is likely to be more appropriate. 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. A word version of the templates in this document is available on the ChurchCare website at <http://www.churchcare.co.uk/churches/guidance-advice/statements-of-significance-need>

**Handouts 65-66**

**Handouts**  
57-64





# 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!

CHURCH BUILDING  
PROJECTS  
Purpose  
Planning  
Procurement



Handouts  
67-68



# Three important topics

## Shrinking the footprint

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

[www.churchofengland.org/environment](http://www.churchofengland.org/environment)

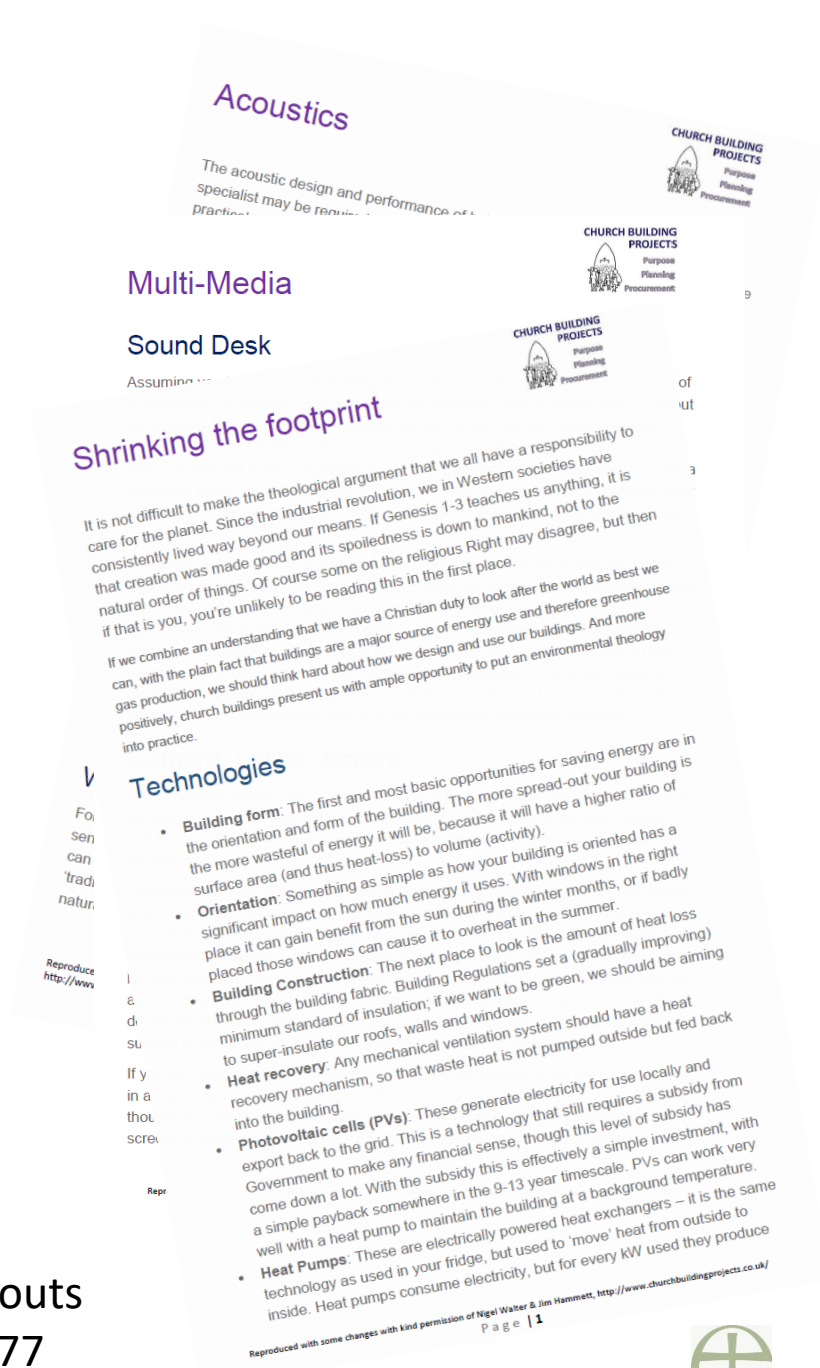
[www.london.anglican.org/kb/sustainable-building/](http://www.london.anglican.org/kb/sustainable-building/)

## 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



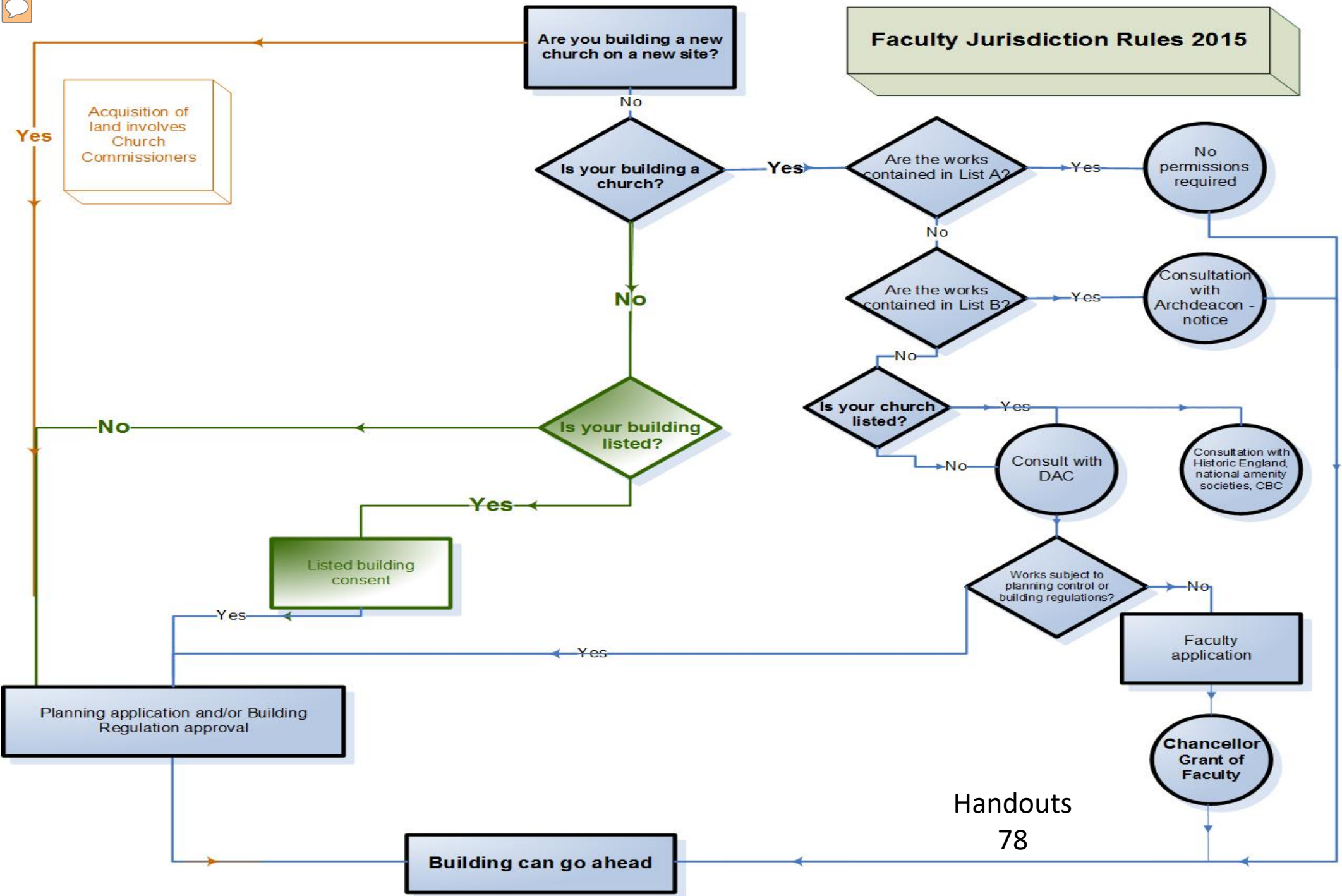
# Faculty Jurisdiction Rules 2015

**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

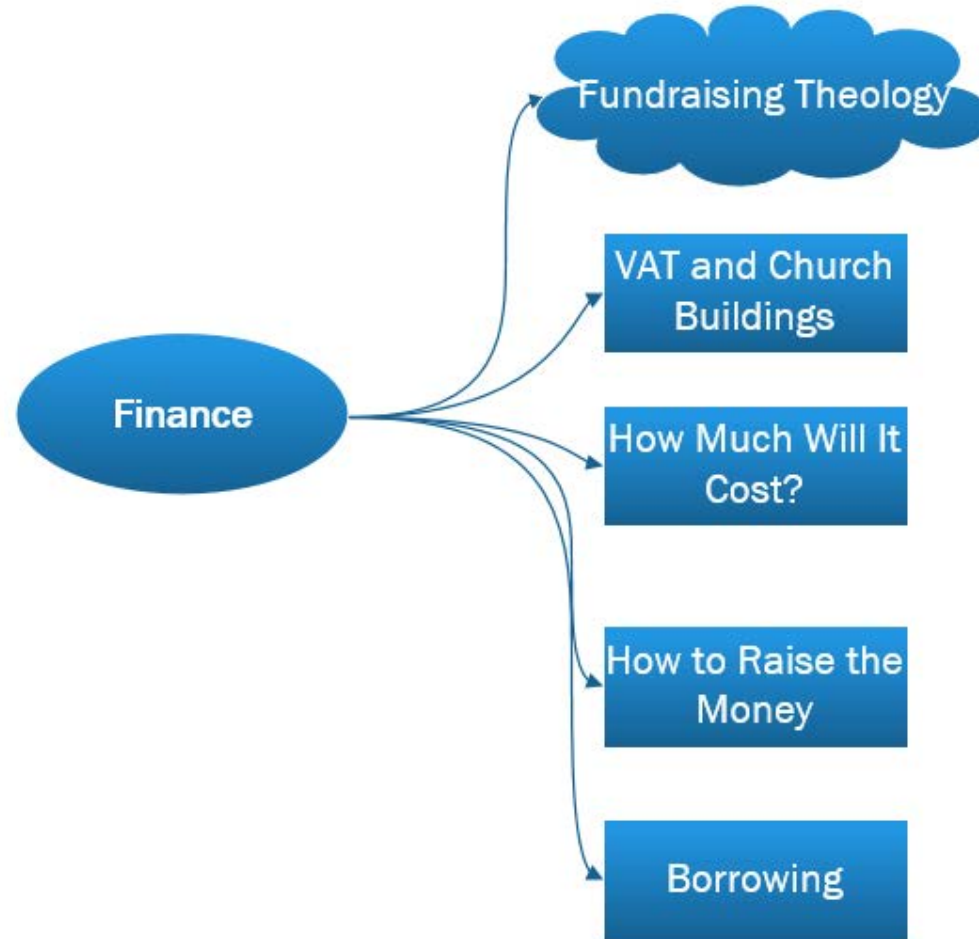




# CHURCH BUILDING PROJECTS



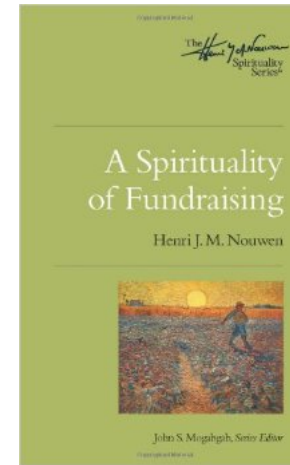
Purpose  
Planning  
Procurement





# Fundraising

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



**Fundraising Theology**

CHURCH BUILDING PROJECTS  
Purpose  
Planning  
Procurement

A few years before his death in 1996, Henri Nouwen wrote a booklet entitled The Spirituality of Fundraising. This is a warm and wise piece of writing, and is an excellent place to start when thinking about the tricky issues around asking people to support ministry of the church. The booklet is both readable and short, and is available in paperback or as an ebook.

The key idea is that fundraising is not one-way traffic. 'Fund-raising is, first and foremost, a form of ministry. It is a way of announcing what we believe in such a way that we offer other people an opportunity to participate with us in our vision and mission. **Fund-raising is precisely the opposite of begging.** When we seek to raise funds we are not saying, "Please, could you help us out because lately it's been hard." Rather, we are declaring, "We have a vision that is amazing and exciting. We are inviting you to invest yourself through the resources that God has given you—your energy, your prayers, and your money—in this work to which God has called us."

Nouwen makes us question our relationship with money, and suggests that the Kingdom of God "...is where God provides for all that we need. It is the realm of sufficiency where we are no longer pulled here and there by anxiety about having enough.' He is characteristically honest about what motivates us; discussing the reluctance to talk about money, he says, 'The reason for the taboo is that money has something to do with that intimate place in our heart where we need security.'

Nouwen roots fundraising in the shared need for community. 'When fund-raising as ministry calls people together in communion with God and with one another, it must hold out the real possibility of friendship and community. People have such a need for friendship and for community that fund-raising has to be **community-building**. I wonder how many churches and charitable organizations realize that community is one of the greatest gifts they have to offer.' And again: 'Those who need money and those who give money meet on the common ground of God's love'.

He ends the book as follows: 'Fundraising is a very rich and beautiful activity. It is a confident, joyful, and hope-filled expression of ministry. In ministering to each other, each from the riches that he or she possesses, we work together for the full coming of God's Kingdom.'

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# 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

### 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 energy and other services, many parishes are exploring the idea of setting up a group of people help to share the costs of running the church.

Many people have a great deal of spare time and skills which they can offer to help with the running of the church. This can be a great way to raise money for the church.

For more information on how to set up a Friends' Scheme, visit the website:

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## 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/>.



This site is provided by the Church of England's National Clergyship & Resources team and offers over 400 pages of resources (web & pdf) to support all aspects of stewardship, administration and management in the local church, as well as links to other sites and pages of interest. If you have any questions or feedback, please contact us.

- PCCs**: Resources for PCC members (see clergy resources) regarding work with the Clergy Commission & APCM home.
- Parish Finance**: Resources for treasurers - tips for new treasurers, support on producing accounts, managing risk and reserves.
- Gift Aid**: A range of Gift Aid facilities including action packages need to take in 2015 including the Small Donations Scheme.
- Giving**: Resources to encourage giving, on Giving for Life, Help for Parish Giving Officers, and for nurturing legacy giving.
- Buildings**: Lots of resources on raising for your church buildings, funding them, and raising Friends Schemes.
- Other**: A range of other resources. You can also order resources from this site.

My colleague Eleanor Gill runs workshops when requested by dioceses and has published a guide to fundraising 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 need 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/>



# How to Raise the Money

Indicative Campaign Timeline (Excerpt)

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

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



# Funding & Grant Making Trusts

## An Introduction

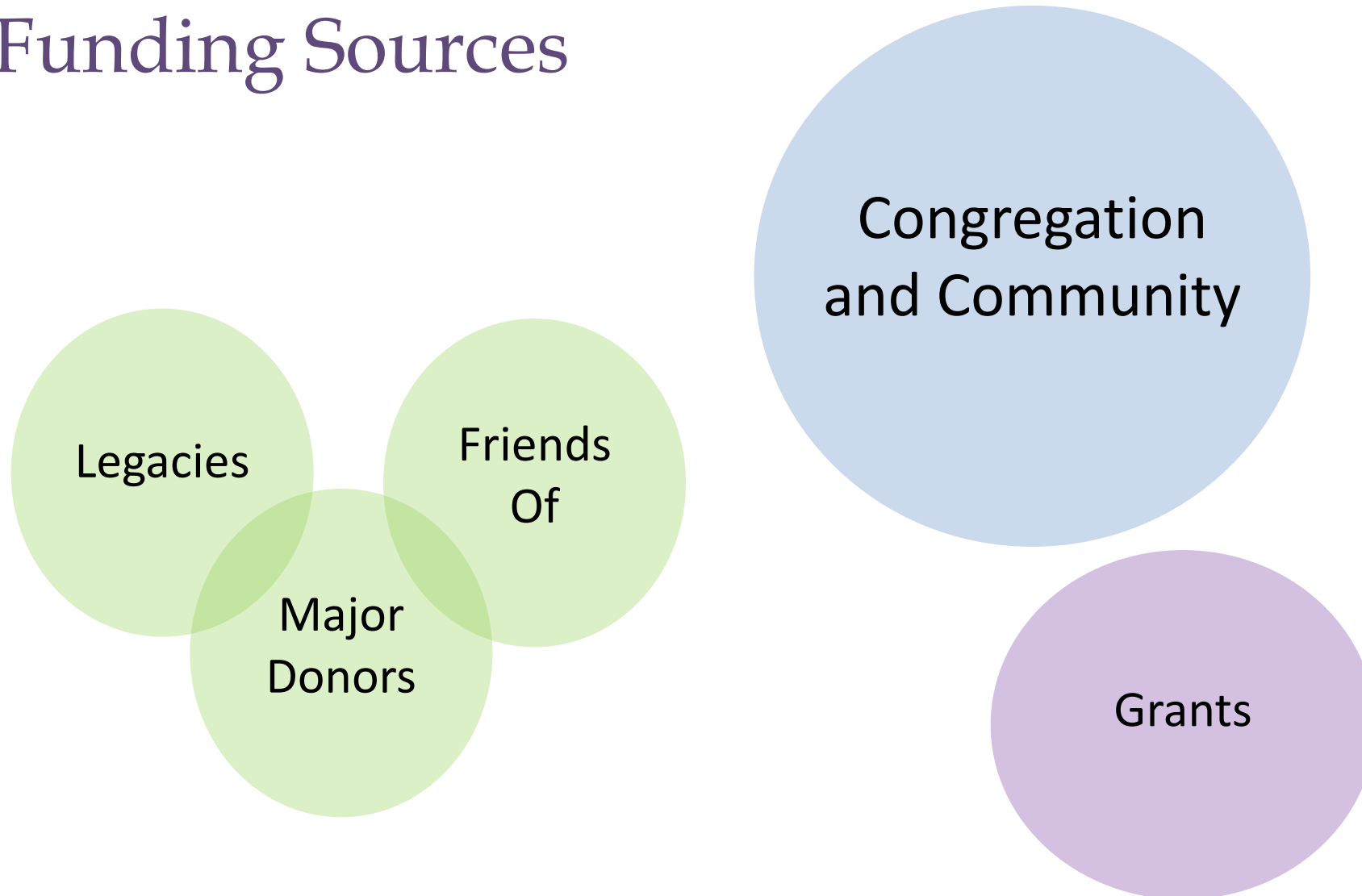
Eleanor Stead

National Legacy & Funding Officer



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# Funding Sources



## Top Funders

- National Lottery Heritage Fund
- All Churches Trust
- National Churches Trust
- Garfield Weston Foundation
- The Landfill Communities Fund
- Listed Places of Worship Grants Scheme (VAT)



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## National Lottery Heritage Fund



### **New Strategic Funding Framework**

- Grants for Heritage: 3 Funding Streams
- £3,000 - £10,000, £10,000 - £250,000 (Initial Enquiry)
- Over £250,000 (Expression of Interest)





## All Churches Trust



### **New Funding Focus**

Building communities, helping people in need to flourish, and growing churches spiritually and numerically.

- 3 Funding Streams
- Small £15,000, Large £100,000, Strategy Over £100,000

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# National Churches Trust



## **New Grant Programmes**

Cornerstone Grants – urgent structural repairs

- £10,000 - £50,000

Gateway Grants – project development

- £3,000 - £10,000

Foundation Grants – urgent maintenance / small repairs

- £500 - £3,000

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## Plenty More Fish in the Sea



1. Funding Central [www.fundingcentral.org](http://www.fundingcentral.org)
2. Funds for Historic Buildings [www.ffhb.org.uk](http://www.ffhb.org.uk)
3. Heritage Funding Directory [www.theheritagealliance.org.uk/funding](http://www.theheritagealliance.org.uk/funding)
4. Recent Church / Local Projects
5. DAC



<https://www.parishresources.org.uk/wp-content/uploads/Charitable-Grants-for-Churches-Feb-2019.pdf>

# National Grants List

## Charitable Grants for Churches

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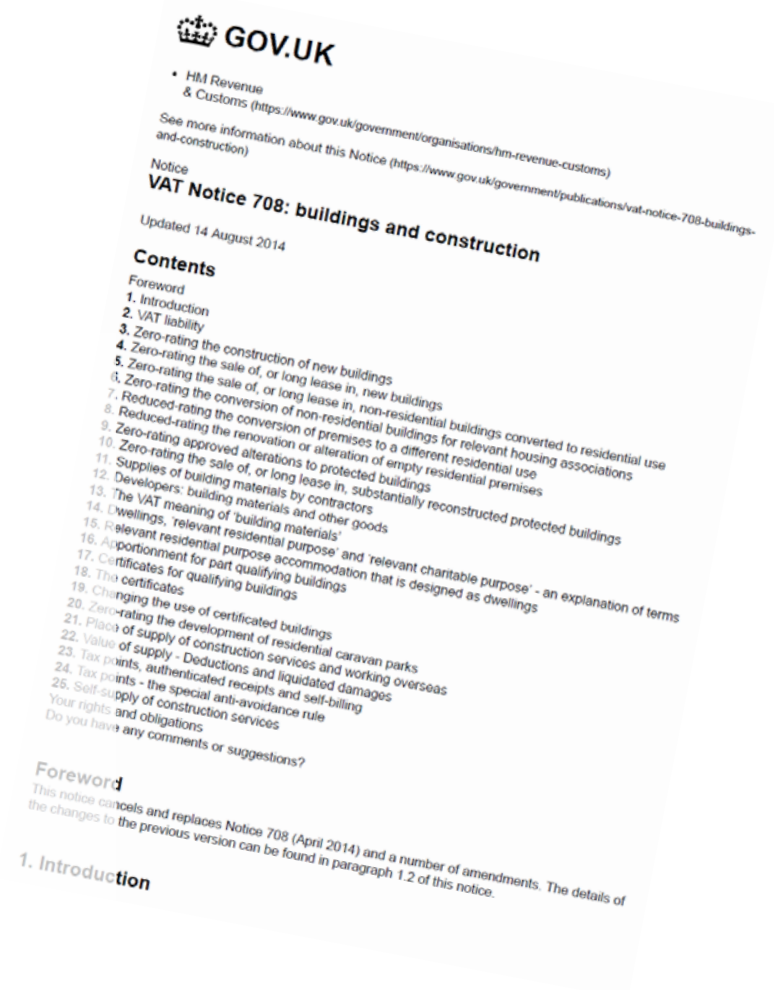
### Contents:

Conservation, Preservation, Heritage & Restoration	P2 - 12
Bells, Organs, Windows & Other Specific Funding	P13 - 19
Community Projects / Improved Facilities	P20 - 27
Christian / Religious Activities	P28 - 33

# 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









# Purpose

## **Sharing**

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







# Discussion

Time for general discussion: your questions, your comments





# Objectives – did we meet them?

- 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?**

