

GUIDANCE ON MANAGING SMALLER PROJECTS

Introduction

The Representative Body has already produced guidance for Parochial Church Councils (PCCs)¹ on managing church building projects in a separate guidance note, *Managing Large Church Building Projects*². This guidance focuses on larger scale re-ordering or repair projects that involve outside consultants and grant funding.

It has been indicated that parishes would value a simpler form of guidance to assist them with implementing smaller projects, which may not have a high value or involve a large team of advisors. However, managing a project, large or small, involves a common approach and consideration of similar issues.

This note seeks to condense those issues into a format suitable for such projects. The note approaches this in a step-by-step format.

Step 1: Define the Project Vision

It is vital to be clear about your project. Ask ‘*What do we want to achieve and why is it important?*’ The answers form the Vision which is worth writing down (perhaps in a PCC minute) so there is a clear reference point to remind you as you continue with your project. This may seem rather grand for a small project, but underlines what it is all about and keeps everybody on track. Always consider how your project will further the mission and ministry of the church.

Step 2: Consult

Make sure everybody who needs to be involved is informed. Clearly, the PCC must be happy with the proposals but it is also worth spending time letting others know. For example, the congregation, the local community, neighbours, the local authority, visitors, etc. Projects succeed and are more enjoyable when people are enthusiastic and supportive.

Projects relating to the building should be undertaken with the involvement of an appropriate architect or surveyor (usually the person that undertook the Quinquennial Inspection). It is worth discussing any project with that person as they will have useful experience. Furthermore, early discussions with the Diocesan Advisory Committee (DAC) Secretary will prove helpful to easing the faculty process.

¹ The term “Parochial Church Council” is used within this document to describe the local church trustee body responsible for the management of the church, hall and churchyard. These bodies may also be known as the Ministry Area Council, the Local Ministry Area Council, Rectorial Benefice Council, Mission Area Conference, or any other term designated by diocesan policies.

² Please contact the Property Department on 20920 348200 or property@churchinwales.org.uk for a copy.

If you do not have an incumbent, consult your Area Dean and Archdeacon at an early stage.

Step 3: Is it feasible?

At an early stage it is important to assess the feasibility of the project. This is the process of assessing the various aspects of the project to ensure it is practical and viable. It should try to identify the 'make or break' issues that will make your project succeed or fail. This can be done quite simply by working through, before you start the project, the steps below. This will help you to flag up issues about the project and make adjustments accordingly.

Step 4: Decide Responsibilities

Decide who is going to be responsible for the project. Projects need to be managed by one person but with others involved. Projects do not succeed when they are run by many people without a clear definition of who takes matters forward. The PCC should decide who will manage the project and give a clear and written brief as to their responsibilities. This allows the PCC the right level of control and avoids interference in detail.

Step 5: Seek Advice

Even for small projects, it is worth taking advice from others. There may be people in your community who know something about your project and who can advise. The Archdeacon or Area Dean may know of similar projects elsewhere. Seeking advice enables you to learn from others successes and mistakes.

Step 6: Obtain Permissions

It is likely that any project will require consent from somebody. Almost all projects will require a faculty, but some will also require consent from the Local Authority. Do not assume that temporary or small scale changes are necessarily exempt. A good starting point is to discuss the project with your DAC Secretary and Archdeacon. Do not start work until permissions are obtained or you are satisfied that they are not required.

Step 7: Choosing the Contractor

You will invariably require a contractor to undertake the work or supply the products you need. It is tempting to use local suppliers and sourcing locally is to be commended. However, you should be satisfied that the suppliers are appropriate by assessing their experience, health & safety policy and practice, training and supervision arrangements. Always check they have appropriate public and product liability insurance.

Step 8: Obtain Best Value

It is important to ensure you obtain best value for your project. The cheapest price is a good starting point, but a higher price may have elements that make it better value (better materials, workmanship, etc). It is advisable to seek three quotations for a project to demonstrate that you have achieved best value. This is not always easy but persevere.

Set out in writing what is required in the form of a work schedule or specification including your vision statement. This is an area where the services of a consultant can be very helpful. By having a defined specification you will obtain comparable prices and have a base from which to agree changes as the project progresses.

Make sure you have the funding in place before you start the project and agree the processes for paying invoices.

Step 9: Be Safe

Every project carries with it some hazards that have the potential to cause harm. You should therefore undertake a risk assessment of the likelihood of those hazards and decide what you will do to reduce the risks. All building projects (large or small) are governed by the Construction Design and Management (CDM) Regulations 2015³ and for small projects you should:

- Be satisfied that any contractor you use has the necessary skills, experience and resources to undertake the work.
- Be satisfied that your contractor holds Public Liability Insurance.
- Ask your contractor to set out, in writing, his plan for managing the risks involved in the job. This is called a Construction Phase Plan and should set out how the contractor will manage health, safety and welfare. You may want to work together with your contractor to prepare this.

More details can be found in the RB guidance note, *Church Building Projects and Safety*⁴.

Keep safety under review and include it as an item whenever the project is discussed, that way it remains in the forefront of people's minds and reduces the risk of accidents.

Step 10: Monitor and Review

Have a defined process for keeping an eye on the project during the 'construction phase' and be clear about who can instruct the contractor. Contractors will not like mixed instructions and may charge more for abortive work. Regular liaison meetings should be arranged during this phase.

Once the project is completed and everybody is delighted with the result, spend some time reflecting on how the project went and what lessons can be learned. Discuss these at a PCC meeting and have the conclusions recorded. Somebody may find them very useful in the future.

Keep the key records and documents associated with the project as they will be useful if changes are contemplated in the future. Record the project in your logbook and terrier.

Alex Glanville
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³ Detailed guidance on these regulations is available from the Guidance Section on the Health & Safety Executive (HSE) website at: <https://www.hse.gov.uk/>.

⁴ A copy of *Church Building Projects and Safety* can be obtained by contacting the Property Department at property@churchinwales.org.uk or calling 02920 348200.