

REPRESENTATIVE BODY OF THE CHURCH IN WALES

GUIDANCE ON MANAGING SMALLER PROJECTS

Introduction

The Representative Body had produced guidance for Parishes on managing Church building projects but this guidance tends to focus on the larger scale re-ordering or repair project involving outside consultants and often 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 and it is worth writing this down (perhaps in a PCC minute) so there is a clear reference point to remind you as you continue. This may seem rather grand for a small project but underlines what the project 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 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 because they will have useful experience. Furthermore, early discussions with the DAC secretary will prove helpful to easing the faculty process.

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 a 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 from the Diocesan Chancellor 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 Diocesan Advisory Committee 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 and safety policy and practice, training and supervision arrangements. Always check they have appropriate public and product liability insurance. More details can be found in the *RB Guidance Note: Health and Safety - Managing Contractors* (see website for details or contact the Property Department)

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 undertake an assessment of the likelihood of those hazards causing harm and decide what you will do to reduce those risks. This is called risk assessment and is really common sense. We assess risk every time we cross the road in looking for a safe gap in the traffic. Risk assessment for projects simply seeks to formalise that process so that its can be seen

that safety was considered. More details can be found in the *RB Guidance Note: Health and Safety - Managing Contractors*. You should also ask your Contractor for their risk assessments relevant to the task they are carrying out.

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.