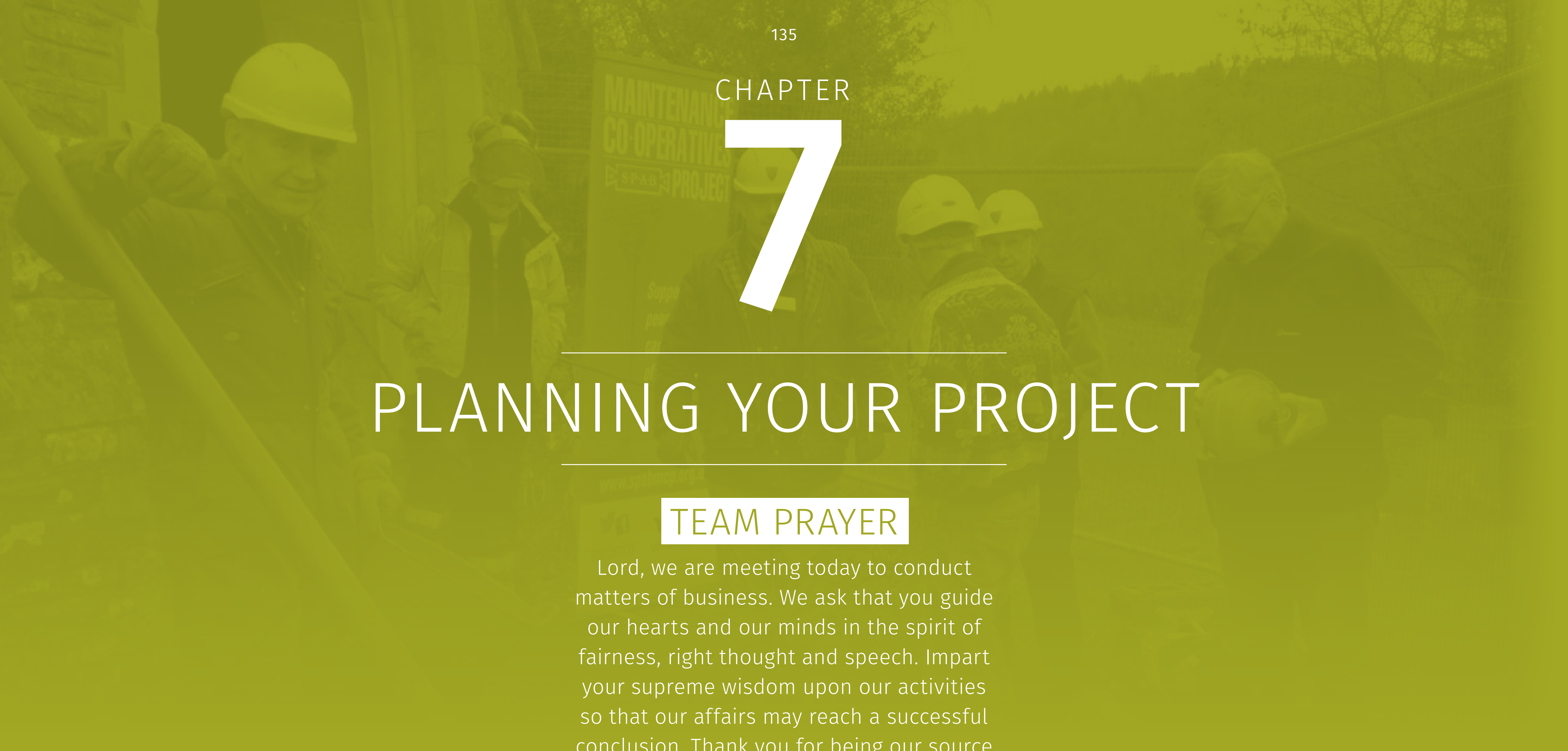

CHAPTER

7

PLANNING YOUR PROJECT

TEAM PRAYER

Lord, we are meeting today to conduct matters of business. We ask that you guide our hearts and our minds in the spirit of fairness, right thought and speech. Impart your supreme wisdom upon our activities so that our affairs may reach a successful conclusion. Thank you for being our source of guidance today. Amen

“For which of you, desiring to build a tower, does not first sit down and count the cost, whether he has enough to complete it? Otherwise, when he has laid a foundation and is not able to finish, all who see it begin to mock him, saying, ‘This man began to build and was not able to finish.”

Luke 14, 28-30

The key is to any project is planning. This chapter will help you develop a plan at the beginning of the project, and then keep it up to date as the project develops, so that you always feel in control. (Here we are talking about a project with a definite end point, not the new activities which may continue after the project has finished.)

There are several aspects to a good project plan. The principles will be the same for a project of any size, though the amount of detail you go into will depend on its size and complexity.

First is the **action plan**. This plans in advance who is meant to be doing what, and when they are meant to be doing it, so that you finish on time. This isn’t just about the building work – it will include all the other things talked about in this toolkit, such as fundraising (Chapters 10-12), writing a business plan for the new activities (Chapter 8), getting permissions (Chapter 6), staying in contact with your supporters (Chapter 2) and so forth. The action plan should cover everything which the project will be doing.

The second aspect is planning your **project costs** and then your cash flow. The third is to think about who your **stakeholders** are, and how you will communicate with them. Finally you should consider the risks of things going wrong, and what you are going to do about them in advance – we’ll call this the **risk register**.

Does this sound like a lot of paperwork? It will all depend on the size and complexity of the project. But there is plenty of evidence that for any size project, you can save considerable time, money and energy by careful planning.

Finally, it is important that an individual or a group of people **monitor** how you are doing throughout the life of the project, and keep the project plan up to date. Our final section discusses this.

CASE STUDY

ST MATTHEW'S, PERTH, CHURCH OF SCOTLAND

www.stmatts.org.uk
and you can watch a short film about this project on Youtube.
www.youtube.com/watch?v=FlY6G2asBBw&feature=youtu.b

St Matthew's Parish church lies in the heart of the city overlooking the river Tay. Designed by John Honneyman in 1871 it is in an early English Gothic style with a tall tower and spire.

In 2010 the kirk session and congregation decided that the church was in need of renovation and established a project board to lead the development of proposals and to raise the necessary funds. The project included major fabric conservation, improved access, removal of the ground floor pews, improved welcoming space, new lighting and refurbishment of the halls. Approval to take the project forward was given by Presbytery in November 2013.

A substantial area under the gallery space at the rear has been fitted out as a café/gathering area. New glazed entrance doors enable the original front doors to remain open. Casual passers-by are lured in to take a look, while the old problem of epic draughts has been resolved. Inside, flexible seating and modular staging enables all sorts of layouts, including a "cat-walk" formation which can place the baptismal font in the centre of the congregation. The original features of the building have been enhanced through sophisticated lighting and audio-visual system. It is now used by an increasing number of both church and community groups.

Substantial funding was provided by Heritage Lottery Fund which as well as allowing major fabric conservation facilitated the production of information about the building with guided tours throughout the summer months. The church is included in The Church Art & Architecture programme of 360 degree recordings which allows people to access it remotely.

www.churchofscotland.org.uk/resources/subjects/art_and_architecture_resources

THE ACTION PLAN

We suggest writing the action plan first. From this you can plan how to communicate with stakeholders, calculate project costs, and develop the risk register. You may find you need to revise the action plan after doing this.

The point of an action plan is to specify what will be done, how it will be done, who will do it and when it will be done in order to achieve your outcome. So it will:

- determine the resources that you need to run your project;
- set out what work needs to be done;
- set out when it needs to begin and end, and how long it lasts;
- describe who needs to do it (e.g. who in the Group will be the contact person for the architect; who will chase up estimates or drawings from your furniture designer?);
- set out what and whether help is needed from elsewhere;
- set out who needs to do the work;
- show where activities overlap or depend on other activities, and by how much;
- state the start and end date of the whole project.

There will often be two levels of action plan. There is the detailed one to cover all the individual activities. This is relatively easy to create for the structural, building and refurbishment works because this detail will be in your architect's schedule of works. But you'll also need to incorporate information about when you need to apply for funding, claim money, undertake additional consultations and recruit and train any more volunteers. Many of these tasks need to happen concurrently.

Then you'll need a top-level one to cover the important stages of planning, fundraising, spending money on high-level designs, getting faculties, detailed design, building and opening – this is for public consumption, the one you would share with stakeholders, funders and for communicating on the project. This is a simplified version of the detailed action plan.

There are many ways to develop an action plan, and several different ways to document it. Here is one suggestion.

First step: define your endpoint

The first step is to define what your endpoint looks like, the moment when the project finishes. This should be fairly detailed. For example you might say that the project finishes when:

- building work is complete, snagged;
- everything is paid for;
- all information is collected to demonstrate success and sent to grant-givers and all donors are thanked;
- the launch ceremony and opening publicity are complete;
- usage and marketing policy for new building agreed, new team in place;
- all project documentation is filed away.

It is worth spending some time getting your endpoint right. You may be surprised how useful this is in focusing minds, and helping you to think ahead.

Second step: work backwards to create steps along the way

The next step is to see how you will reach your endpoint. We suggest you do this by working backwards from the endpoint, not forwards towards it. Ask 'what task has to be done to reach that point', and then work backwards to the previous task and then the one before that and so on. (Some people suggest listing milestones rather than or as well as tasks, and that is another way of doing it. A milestone is a definite point you've reached in a project. We will use the task method.)

For example looking at just one aspect of the endpoint, 'Building work complete and snagged' then the tasks might be – working backwards:

- carry out the snagging and get signoff and pay any monies due;
- make list of snags and agree them with contractor;
- do the building work and pay as per agreed schedule;
- agree timetable with contractor;
- review and sign the contract AND ALSO complete fundraising;
- choose the contractor;
- send out tenders to contractors AND ALSO complete design work AND ALSO have obtained all necessary permissions;
- . . . . and so on, back to the beginning which might be 'Agreeing the vision'.

And similarly for every part of your endpoint statement. This toolkit should help you create sensible tasks.

One type of task which is easy to overlook is what sort of information do you need to collect while the project is taking place? For example, do you need to know how many hours volunteers are helping out so that you can include this 'in-kind' contribution as part of your match funding? (See Chapter 8.) If so, create a timesheet that everyone can complete as and when they do some work.

You will end up with a good many tasks, in reverse order. In general you should go into more detail for the early stages of the project. Later stages can have larger, more general tasks. Later on, as the project progresses you can add detail to the later stages when you update the plan.

Once you have done this, reverse the list, so that the earliest tasks come at the top.

Third step: organise into work streams

The next step is to organise these tasks into different work streams. A work stream is a series of tasks (or milestones) which naturally hang together. It makes it easier to manage the project. Some work streams will go on throughout the whole project, others will occupy only part of the project. Here's a starter list of work streams which you might find useful (but do develop your own):

- Develop mission action plan and agree vision.
- Engage with community and other 'stakeholders'.
- Develop business plan for new activities (if needed).
- Fundraise and engage with donors.
- Land acquisition, site surveys, legal checks etc...
- Design and contract, obtain permissions.
- Build.
- Organise for when current building not available.
- Set up new activities and handover / ensure benefits arise from project.

A few words about the business plan work stream. You may have to compile a business plan so that you can demonstrate how your new activities will operate in the future and demonstrate their financial sustainability. Some funders will expect to see this before they consider supporting your project. There is more guidance on this in Chapter 8.

And a brief comment on the final work stream – however simple your project, you will be intending that good things will come out of it. Your project plan should include whatever is necessary to make sure this happens.

Now take the list of tasks you have completed, and mark it up with the work stream each of them belongs to.

Of course, there will be links between the work streams. No building contracts can be signed until fundraising is successful. No launch ceremony can happen until the building work is complete. We'll come back to that in a moment.

Fourth step: create a timetable and identify links

Now comes the interesting and difficult bit. You are going to create a timetable, taking account of the links between various tasks. One simple and powerful way, is to have a column for each work stream, with one row for each month. Then the start and end of each task can be put in their appropriate column.

This is not trivial, and often it will take several attempts to get right. It's best to involve people who have some idea of how long various tasks can take. Incidentally, it's good practice to build in some 'slack' – i.e. spare time. 20% is a typical recommendation if you know roughly how long each task will typically take, definitely more if you are guessing.

At this stage do check very carefully how one task depends on another having already been completed. Try and find someone who knows what they are talking about.

For example, you must finish fundraising before you sign the building contract. You will find, of course, that some tasks overlap.

	Building	Fund raise and engage with donors	Engage with community etc.	Set up new activities and handover
previous months, not shown here				
Jan 2019	Start review and sign contract	Finish fundraising	Finish celebrations to celebrate fundraising complete	
Feb 2019	Finish review and sign contract			
Mar 2019			Start arranging photo-recording of building work (continues to end of building work)	Start discussing wording of usage contract for new building
April 2019	Start building work			
May 2019				Wording of usage contract agreed
following months, not shown here				

And you are now in a wonderful position – you have estimated how long the whole project will take, and you know what you have to do get there and in what order. Incidentally, if you want the project to finish sooner than the plan shows, by all means run through the process again. But don't fool yourself.

This timetable will quite certainly need revisiting quite often during the course of the project. You will learn of new tasks which you overlooked the first time round (whoops! – the bat survey), and your first guess as to how long things will take will prove wrong. But at least you will know what is going on, and what the knock-on effect will be.

Another way of recording the same information is by means of a series of timelines, one timeline for each task, grouped by work stream. This is known as a Gantt chart, as it was invented by Henry Gantt about a hundred years ago. You can do this in a spreadsheet, or you can use specialist software to draw the timelines, and give them the task names. You will find links to producing a Gantt chart in *Further Resources* at the end of this chapter.

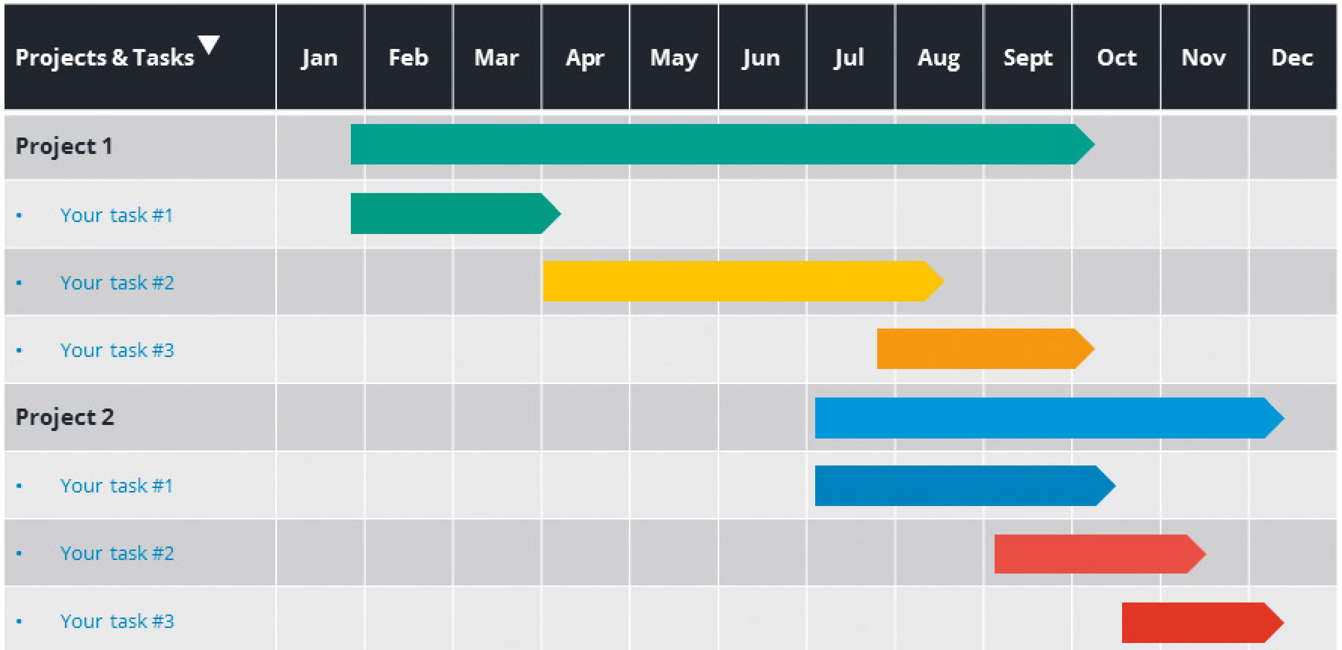

Fig 5 example 12 month Gantt chart

Congratulations – you have now created your high-level action plan, for public consumption. (If the tasks are too detailed, simply combine some of them into bigger tasks.) Now you must develop this into a detailed action plan.

Fifth step: allocate responsibilities

Now you must say who is responsible for what. Each task should have a responsible person. You may want to change responsibilities as you move forward. But it's a good idea to try and allocate all responsibilities at the beginning, as this will often help you identify what skills your Group needs, and when there is going to be a problem with people being too busy or not being available.

Of course, as well as the responsibilities listed here, your Group will need other skills just to keep the show on the road - chair, treasurer, secretary etc. See Chapter 3 for more about organising your Group. One important role is monitoring how well the project is going. This is discussed later.

Sixth step: flesh out the timetable into a detailed action plan

You can now flesh this out into a full action plan. The amount of detail you go into depends on your circumstances. It's usually best to go into more detail for the earlier tasks, and then repeat the process during the project.

1. You can list the 'r**esources, external people and organisations**' which are needed to complete each task. Resources can be particular skills, such as access to a good photographer, or the need for particular kit, such as banners to advertise the project. External people will include not only your architect and design team, but also the various agencies with whom you will come into contact, for example Historic England, your DAC or equivalent, or the relevant Amenity Society. If you list these now, it is easier to plan ahead in making contact.

2. You can agree the **principles** (or 'strategy' if you prefer) **for each work stream**. For example, how will you engage with the community? With a newsletter? Website? Meetings? Word of mouth? Again, how will you handle the 'design and contract' work stream? Will everyone be involved in making every decision? Will you engage with a wider group of people at key points?

3. You can work out **exactly how you will carry out each individual task**. For example, exactly how are you going to agree the wording of the usage contract for the new building? Who is going to draw up a draft? Will you be talking to other people who run similar activities? Who will do this? Who needs to look at the draft and agree it? Some tasks are so straightforward that they don't need this level of detail, others really benefit from some planning.

4. You can look ahead and spot **periods when individuals are going to be very busy or unavailable**, and think how you might handle this.

5. You can think about **who you need to keep informed** during each task, and how you will do this. This can be useful when thinking about your **stakeholder plan** (see below).

6. You can use this as input for your **project costs**. It is also of some use for your **risk register**. There is more on both of these below.

Seventh step: use and update this regularly

This is your best guess now, but things will change. So regularly review and adapt your action plan with better timings, or as you discover any further steps you need to take. When you identify a new action that needs to be taken, identify who in the Group should be responsible for it. Ensure that you continue to have regular meetings and that those who have taken on responsibility for different aspects report back regularly on progress and alert the Group to any potential problems, so that the person responsible for monitoring the project can see what the overall impact will be.

If you have never worked in this way before, you will be amazed at the sense of control it gives you.

STAKEHOLDER PLAN

It can be really useful to make a systematic list of all the groups of people who have an interest in your project. The action plan will give you a head start with this, but you will need to spend some time brainstorming a complete list. It will include decision makers, advisory groups, funders and donors, the media, those affected directly by the project, those who might have an interest in the project because of previous involvement with the church, other local voluntary groups, potential users of the new building. . .
and so on.

Once you have your list, think how you will engage with the various groups. What do they need to know, and how often? What, if anything, do you need from them? Is it one-way or two-way communication? And how are you going to cover these groups with the minimum effort?

You may find this feeds back into an improved action plan.

WORKING OUT PROJECT COSTS

A key element to project planning is determining costs. You can use your activity plan to do this. Simply estimate the cost of each task – for example, how much will it cost to keep a photographic record of the building work and post it on a website? How much will it cost to have a celebration at the completion of the work? How much to produce a guidebook?

The problem, of course, is that most of the cost is likely to come from the building work, which you are unlikely to know with any certainty at the beginning of the project. As the project progresses you will have increasing information on this.

There will be tendering exercises for your architect and design team, and later to procure a contractor to undertake any building works and obtain the best value costs. As discussed in chapter 14, advertising and seeking tenders for the building works will usually be part of the services you ask your architect, building surveyor or quantity surveyor to do. However, it is a good idea for your project monitoring team or working sub-group to be involved. You will also have to get several quotes for any equipment and furnishings.

Consider at what point you need to draw up any contracts, either to commission people to work on your project or for when the project is complete and the community want to start using their new facility. Do you have enough money to pay for the initial expenditure? Investigate whether you need to take out any additional insurance – for when the building works are taking place, or when they are finished. Public Liability Insurance is one such cost to bear in mind, especially if you're using volunteers. (See Chapter 14).

Funders will expect to see a breakdown and evidence of how you arrived at your costs for the building works and other expenses. The tendering exercise and quotes will provide you with the necessary documentation. Remember to check the procurement requirements of each of your funders – this will save time and trouble in the long run if you do it in the way they ask you to.

Once you have the costs of each task, plan out your cash flow. At what stage will contractors and others require payments? Do you have sufficient resources to make these payments until you begin receiving grant money? (There is more on this in Chapter 13.)

PROJECT RISK ASSESSMENT – THE RISK REGISTER

Don’t confuse a project risk assessment with a standard risk assessment which is mainly about reducing the risk of someone coming to harm. For guidance on this type of risk assessment, please refer to the Health and Safety Executive.
www.hse.gov.uk/risk/controlling-risks.htm

A project risk assessment is different. It is about identifying risks which might arise to your project and thinking about ways to mitigate those risks, and what actions will need to be taken if unforeseen things do happen. Some formality in this process is important. Create a role for someone whose responsibilities include creating and maintaining a risk register, with a record of the mitigating steps taken. This is good practice and will demonstrate to funders and partners that you understand what can go wrong. A good template for a project risk register can be found on the website of PMIS.
www.pmis-consulting.com/project-risk-assessment-template

Your action plan will probably be useful in identifying some risks. For example, if the completion of the building work is delayed, what risk is there (if any) to the arrangement for the start date of the new activities and how much does this matter? But the action plan will only go some of the way in helping you identify risks, and you will have to give some serious thought to the other major risks you face. You may find that managing these risks is then included in an improved action plan.

Examples of such risks could include:

Governance

Much of what you will be doing in connection with your projects will be unfamiliar. If you try and muddle along without accepting that you have to create some special roles and make responsibilities clear, and are not careful in choosing the right people for your team, you run the risk of suffering some major impacts on your church. You may need to consider what would happen if a key individual moved away or become ill.

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!

PROJECT MONITORING

Your project action plan will be your main tool for monitoring the project, together with the budget, the cash flow plan, the risk register and the plan for engaging with stakeholders.

This is the time to consider who will monitor the project on a day-to-day basis. Incidentally, the person monitoring the project is not normally the Chair. Make sure to give the task to someone who is comfortable with detail and can look ahead.

For monitoring the progress of some of the work, you may find it useful to establish a **project monitoring team** or **working sub-group**, within your Group. Give key tasks to a handful of members. That way, it's much easier to know who is doing what and who is responsible for what. For example, during major building works, it may be sensible for someone from the Group to meet the architect every couple of days. Use one point of contact.

TOP TIPS

- Time spent planning is rarely wasted.
- The action plan is just one part of planning.
- **Don't commit** yourself to any works and do not sign any contracts with builders until you receive **offer letters from funders**. Any expenditure incurred before the date of an offer from a funder will be **ineligible** for grant support, but you also need to be sure that you can pay for any work before you sign contracts.
- Ensure you know when you should receive any required permissions from the relevant authorities, and who should receive them. You can only begin work when you have permission to do so.
- If there's a delay of several months between getting estimated building costs and applying for funding, get revised quotes to check your figures are still correct.
- Continue to take photos of the work in progress so you have a pictorial reference of the project. This may prove useful for final reporting and evaluation processes.
- Once you have permissions in place and are ready to start major alterations, renovations or repairs, it's important that you inform your insurer as soon as possible – see Chapter 14.

CHAPTER 7 CHECKLIST

Have you created a project action plan combining information from your architect's schedule of works with your own project actions?	☐
Have you established a project monitoring group and allocated key responsibilities to specific members of the group for when the project is being implemented?	☐
Have you established appropriate and realistic costs for your project by obtaining several quotes for each cost?	☐
Have you planned your potential cash flow?	☐
Have you created a risk register?	☐
Have you thought about how you will communicate with your stakeholders?	☐

FURTHER RESOURCES

Parish Resources provides guidance on producing Gantt templates for Excel
www.parishresources.org.uk/buildingprojects

You can find a programme for producing and maintaining Gantt charts in Microsoft Powerpoint here *www.officetimeline.com*

Microsoft Project for producing Project Plans is available at special prices for Church of England/Church in Wales churches from the Parish Buying website
www.parishbuying.org.uk

The **National Lottery Community Fund** (formerly the Big Lottery) provides useful guidance on evaluation
www.biglotteryfund.org.uk/funding/funding-guidance/applying-for-funding