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**Checklist for Property Projects**

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|  | **Action** | **Date** |
| 1 | **Approvals you may need before work starts:** |  |
| (a) | Planning permission | Required for most works which will change the external appearance of a building, including signage and any fencing over 1m high. These applications can be generated by Elders or church members but they are getting more and more complicated and I usually ask an architect to do this now for schemes that are not straightforward. Can take 16 weeks or more. |  |
| (b) | Building Regulations | Required for works requiring structural changes. You can use the local council or a third party, such as [Bluekeep](http://bluekeep.co.uk/holding.html). Often much quicker process than planning permission. |  |
| (c) | Listed building consent | Required for most works to listed buildings unless it is on a like-for-like repair basis. This used to be carried out internally within the URC (ecclesiastical exemption) but the URC can no longer support the processing of these applications so they must be made to the local authority. There is no fee for these applications. Conservation officers can be helpful and equally some can be rather difficult to please. |  |
| (d) | Synod approval | Synod approval is required for works that substantially alter a church, hall or manse’s character, appearance or value. Where the United Reformed Church (Northern Province) Trust Ltd is trustee, it will also give consent for anything other than minor works. |  |
| 2 | **Professional services you may need to engage:** |  |
| (a) | Project manager | Useful to co-ordinate all aspects of a project and be a single point of contact. This person should ensure compliance with all the various strands of legislation (including health and safety) and should focus on three key areas; quality, schedule and cost. |  |
| (b) | Structural engineer | Required for any structural changes. |  |
| (c) | Fire safety consultant | Useful to generate a fire risk assessment and give guidance on compliance. You can also use checklists from insurance companies and fire authority, but it can be quite difficult to get answers to 'grey areas'. |  |
| (d) | Mechanical & electrical engineer | Useful to design electrical services and heating for complex schemes. |  |
| (e) | Interior designer | Useful if there's no expertise within the church. It can be quite onerous for individuals to take this on as everyone has an opinion about it! |  |
| (f) | Architect | Useful if a planning application is needed. |  |
| (g) | Asbestos consultant | Part of 'due diligence' prior to work taking place. A management survey is a first step but if a significant alteration is happening, a 'refurbishment level survey' (which is more invasive) will be required. |  |
| 3 | **Process:** |  |
| (a) | Pull together scope document | Write down a summary of what you wish to get done. Use photos if necessary. I import into Powerpoint then add text to describe what is needed. Include as much detail a possible and any specific challenges you are aware of. This might be the statement of a problem to be fixed, or a specific development that is required. |  |
| (b) | Agree tender list | (Usually minimum of three contractors). Use local contractors where possible. Check out their [TrustPilot](https://uk.trustpilot.com/) rating and compare versus other contractors doing the same work. |  |
| (c) | Send scope document to contractors for pricing |  |  |
| (d) | Meet contractors on site | Encourage contractors to suggest changes to the scheme, to improve the end result or make things more efficient to build (and cheaper). |  |
| (e) | Receive proposals and generate 'tender analysis'  | The tender analysis summarises, in one table, the offers received. It is not necessary to choose the lowest cost, or indeed any of the contractors. This exercise helps to demonstrate clear thinking and communicates that a fair process is in place. Get a clear understanding of payment terms. Up front payments are to be avoided wherever possible and payments should be linked to project milestones. |  |
| (f) | Appoint contractor | Consider a formal contract (such as one of the off-the-shelf [JCT](https://www.jctltd.co.uk/category/standard-building) contracts for a large scheme). |  |
| (g) | Get work carried out | Ensure works are managed on site to comply with scope document and health and safety (as, ultimately, the church will hold responsibility for any accidents that happen at their site and will need to demonstrate that H&S was pro-actively managed in the rare event of an incident). |  |
| (h) | Receive documentation and close project | Ensure you have all warranties and O&M (operating and maintenance) manuals. Set up maintenance schedules to keep building in good condition and ensure any maintenance conditions linked to warranties are honoured. |  |
| 4 | **Health and safety:** |  |
| (a) | CDM | [Construction, Design and Management Regulations (2015)](https://www.legislation.gov.uk/uksi/2015/51/contents), are a set of UK rules designed to ensure health and safety in construction projects, requiring proactive planning and risk management from start to finish. This is a complicated area but it basically covers most building and repair works to buildings. |  |
| (b) | RAMS | Risk assessments and method statements are two key documents required to demonstrate 'due diligence' and compliance with CDM regs. Contractors should generate these to show you how they will work safely |  |
| (c) | Access to height and scaffolding | Falls from height are the biggest cause of fatalities in construction and access always needs to be taken seriously – this needs to be included in the contractor's RAMS. |  |
| (d) | Insurance | Ensure both Public Liability and Professional Indemnity insurance in place |  |
| 5 | **Certification:** |  |
| (a) | Electrical | The electrical contractor will test and certify their work – ask for the test certificate. |  |
| (b) | Gas | Use only [GasSafe](https://www.gassaferegister.co.uk/) registered contractors for any gas work. |  |
| (c) | Building Regulations | Ensure you get a 'completion certificate' at the end of the project, to demonstrate compliance with building regs. |  |

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