## HOW TO: Programme and Phase Projects

Rosie Fraser, Vice-Chair

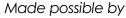
**London Historic Buildings Trust** 

John Bailey

**Thomas Ford & Partners** 









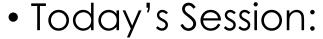
### About LHBT

- Charity, founded 30 years ago
- Only London-wide building preservation trust
- Focus on Heritage at Risk
- Small team: 1 full-time, 3 x part-time staff, 12 trustees
- 4 years ago new vision, new strategy, new name
- Social impact at our heart
  - 'sustainable projects, innovative social solutions and cultural benefits'
- Deliver:
  - Heritage projects, both built and intangible
  - Sector Training HOW TO; Building Futures
  - Community Group support
  - Consultancy
- Currently funded in part by Historic England's Capacity Building grant programme



#### Introduction

- Who we are
  - Rosie Fraser LHBT Vice Chair and Heritage Consultant
  - John Bailey Thomas Ford and Partners, Conservation Architect



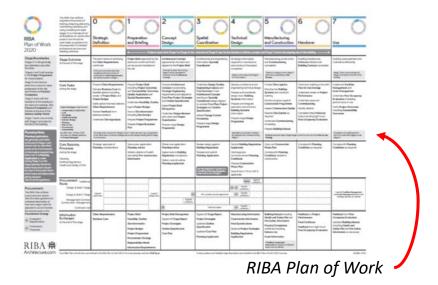
- Purpose of a Programme
- Case Study Newport Minster
- Example Phasing
- Top Tips
- Resources
- Any Questions?





### Purpose of a Programme

- Drives identification of key dates
  - RIBA Design Stages
  - Permissions / Faculty
  - Construction
- Supports key decision making
- Used to track budget / programme overruns
- Track NLHF funder requirements
  - Funding deadlines
  - Permissions to Start
  - Development Phase Mid Stage Review
  - Delivery Phase







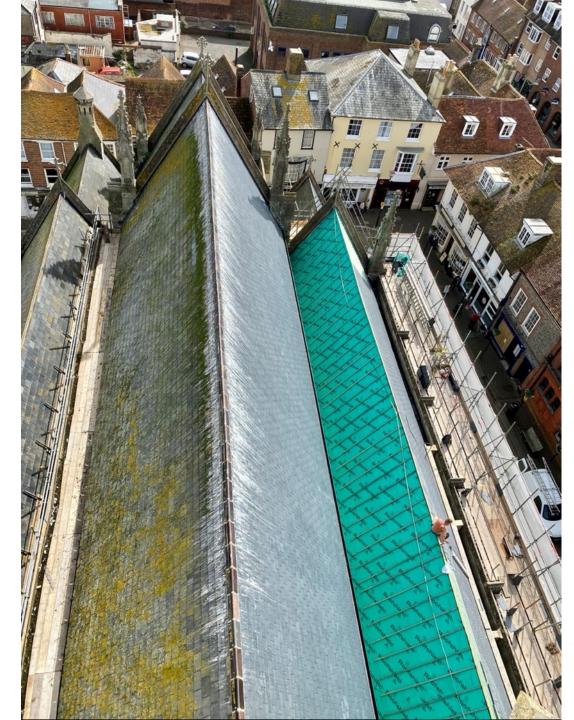


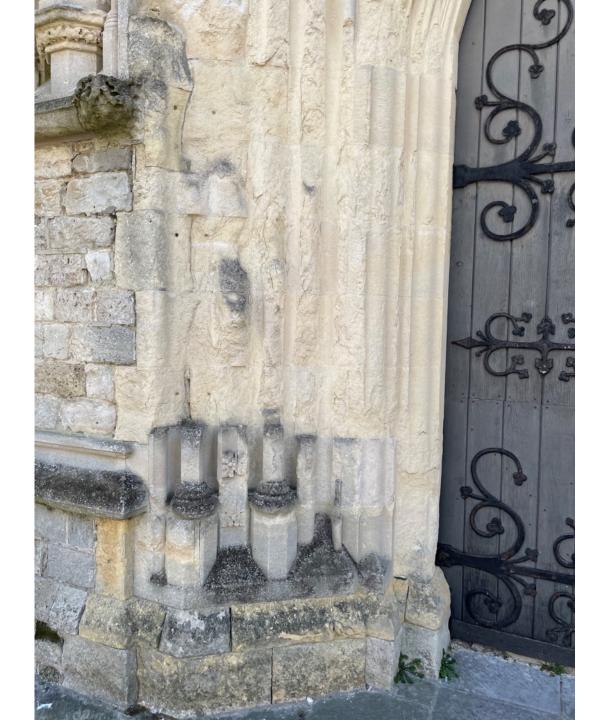
# Case Study: Newport Minster, Isle of Wight

- Grade 1 Listed church £2.4m refurbishment project
- Two phases:
  - Repairs to historic fabric Jan-June 2022
  - Internal reordering –Jan-Oct 2023
- Still on programme despite losing a major donor and re-design request











# Case Study: Newport Minster Outline Programme

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Newport Minster - HLF Grant Aided Repairs and Reorde	ring - 6 April 202	0																																		
Project Lead:				2020			 	Sep Oo		2021	Feb		1.								2022	Feb							 2023							Sep
WBS Task Name	Start	Finish	Dura Percent tion Complete	Apr 4	May 5	Jun 6		9 10	Nov Dec		2	Mar 3	Apr 4	May 5	Jun 6	Jul 7	Aug 8	Sep 9	Oct 10	Nov Dec 11 12	Jan 1		3		Jun 6	Jul Aug 7 8	Sep 9	Oct 10	Dec Jar 12 1	an 1	Feb Mar 2 3	Apr 4	May 5	Jun Jul 6 7	Aug 8	Sep 9
Submit RIBA Stage 2 to DAC for outline aproval by 10/06 at the latest	Fri 01-May-20	Mon 01-Jun-2																																		
▶ 2 Complete RIBA Stage 3	Wed 15-Apr-20	Tue 09-Jun-2	0 40 0%																																	
▶ 3 DAC decision on outline scheme	Wed 10-Jun-20	Wed 10-Jun-2	0 1 0%																																	
▶ 4 Decision from HNLF on RIBA Stage 2 submission	Mon 27-Apr-20	Mon 11-May-2	0 11 0%																																	
▶ 5 Design Team meeting to finalise RIBA Stage 3 work	Wed 15-Apr-20	Wed 15-Apr-2	0 1 0%																																	
▶ 6 Designe Team to complete RIBA Stage 3 work (interior and exterior)	Thu 16-Apr-20	Thu 16-Jul-2	0 66 0%																																	
▶ 7 QS to finalise Bill of Quantities	Fri 17-Jul-20	Tue 18-Aug-2	0 23 0%																																	
▶ 8 Clarification of Procurement and Form of Contract	Thu 16-Apr-20	Wed 15-Jul-2	0 65 0%																																	
▶ 9 Selection of Archaeological Contractor	Thu 16-Apr-20	Wed 15-Jul-2	0 65 0%																																	
▶ 10 Main Contractor Expresions of interest and compilation of shortlist	Thu 16-Apr-20	Wed 15-Jul-2	0 65 0%																																	
▶ 11 Tender Action	Wed 19-Aug-20	Wed 30-Sep-2	0 31 0%																																	
▶ 12 Submission to DAC for final aproval at 03/09 meeting	Wed 19-Aug-20	Mon 24-Aug-2	0 4 0%																																	
Application for Faculty and Determination Period (interior and exterior work)	Thu 24-Sep-20	Thu 24-Dec-2	0 66 0%																																	
▶ 14 Tender Evaluation	Thu 01-Oct-20	Mon 02-Nov-2	0 23 0%																																	
▶ 15 Potential Tender Adjustment	Tue 03-Nov-20	Fri 04-Dec-2	0 24 0%																																	
▶ 16 Recommendation of contractors to client	Mon 07-Dec-20	Fri 11-Dec-2	0 5 0%																																	
▶ 17 Submission to HLF, and processing time for Approval	Mon 14-Dec-20	Wed 31-Mar-2	1 78 0%																																	
▶ 18 Application and Approval for Permision to start from NHLF	Wed 31-Mar-21	Fri 30-Apr-2	1 23 0%																																	
▶ 19 Appointment of contractors for internal and external work	Mon 03-Jan-22	Mon 03-Jan-2	2 1 0%																																	
▶ 20 RIBA Stage 4 Work	Thu 01-Jul-21	Fri 30-Jul-2	1 22 0%																																	
▶ 21 Prestart meeting for external work	Tue 04-Jan-22	Mon 31-Jan-2	2 20 0%																																	
▶ 22 External Work starts	Mon 14-Mar-22	Wed 14-Dec-2	2 198 0%																																	
Prestart meeting for internal works	Mon 03-Oct-22	Mon 31-Oct-2	2 21 0%																																	
▶ 24 Internal Work starts	Tue 03-Jan-23	Sat 30-Sep-2	3 194 0%																																	
Type here to add a new task																				•											•					



# Case Study: Newport Minster Detailed Programme

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Newport Minster - HLF Grant Aided Repairs and Reo Project Lead:			2020							2021										2022									2023									
			Apr		Jun		g Sep	Oct		Dec Ja	an Feb		Apr	May Ju	n Jul	Aug	Sep	Oct Nov 10 11	Dec	Jan 1	Feb	Mar Apr N	May Ju	n Jul	Aug	Sep O	ct Nov	Dec	Jan 1	Feb		Apr 8	May Jun	Jul	Aug			ov Dec
WBS Task Name	Start	Finish Dura Percent tion Complete	4	5	6	7 8	9	10	11	12 1	1 2	3	4	5 6	7	8	9	10 11	12	1	2	3 4	5 6	7	8	9 1	0 11	12	1	2	3	4	5 6	7	8	9	10 11	1 12
Design Team Meeting	Mon 06-Apr-20	Mon 06-Apr-20 1 0%																																				
2 Submit RIBA Stage 2 to DAC for outline aproval at May meeting	Tue 07-Apr-20	Thu 30-Apr-20 18 0%																																				
3 DAC Advice on RIBA Stage 2	Mon 18-May-20	Mon 18-May-20 1 0%																																				
4 Design Team meeting RIBA Stage 3	Wed 15-Apr-20	Wed 15-Apr-20 1 0%																																				
5 Design Team complete RIBA Stage 3	Wed 15-Apr-20	Tue 16-Jun-20 45 0%																																				
6 NHLF Midterm Review Meeting	Mon 27-Apr-20	Mon 27-Apr-20 1 0%																																				
7 NHLF Mid-Term Feedback	Mon 27-Apr-20	Fri 08-May-20 10 0%																																				
8 Design Team to finalise RIBA Stage 3 work for NHLF Round 2	Tue 16-Jun-20	Wed 28-Oct-20 97 0%																																				
9 NHLF Round 2 Submission	Mon 02-Nov-20	Fri 26-Feb-21 85 0%																																				
10 NHLF Rond 2 pass	Fri 26-Feb-21	Fri 26-Feb-21 1 0%																																				
11 Design Team Appointment to tender	Mon 01-Mar-21	Mon 01-Mar-21 1 0%																																				
12 Design Team Meeting	Mon 01-Mar-21	Mon 01-Mar-21 1 0%																																				
13 Design Team to complete tender documentation	Mon 01-Mar-21	Mon 10-May-21 51 0%																																				
14 QS to finalise Bill of Quantities	Mon 03-May-21	Thu 10-Jun-21 29 0%																																				
15 Main Contractor Selection Process	Wed 10-Mar-21	Tue 01-Jun-21 60 0%																																				
Selection of Archaeological Contractor	Wed 10-Mar-21	Tue 01-Jun-21 60 0%																																				
17 Final DAC Submission	Mon 10-May-21	Mon 10-May-21 1 0%																																				
18 DAC Aproval and Faculty	Tue 01-Jun-21	Thu 30-Sep-21 88 0%																																				
19 Main Contractor Tendering (two contracts)	Thu 01-Jul-21	Tue 10-Aug-21 29 0%																																				
20 Tender Return (both contracts)	Tue 10-Aug-21	Tue 10-Aug-21 1 0%																																				
21 Tender Evaluation (both contracts)	Tue 10-Aug-21	Tue 31-Aug-21 16 0%																																				
22 Potential Tender Reductions	Tue 31-Aug-21	Tue 21-Sep-21 16 0%																																				
23 Recommendation of contractors to client	Fri 01-Oct-21	Fri 01-Oct-21 1 0%																																				
24 Submission to NHLF for approval	Tue 05-Oct-21	Tue 05-Oct-21 1 0%																																				
25 Approval from NHLF	Fri 31-Dec-21	Fri 31-Dec-21 1 0%																																				
26 NLHF Permission to Start	Wed 05-Jan-22	Mon 31-Jan-22 19 0%																																				
27 Appoint Contractor (external work)	Wed 05-Jan-22	Wed 05-Jan-22 1 0%																																				
28 Prestart meeting for external work	Tue 25-Jan-22	Tue 25-Jan-22 1 0%																																				
29 External Work on site	Fri 01-Apr-22	Mon 31-Oct-22 152 0%																																				
30 Appoint contractor for internal works	Mon 03-Oct-22	Mon 03-Oct-22 1 0%																																				
31 Internal Work Prestart Meeting	Mon 31-Oct-22	Mon 31-Oct-22 1 0%																																				
32 Internal Works commence on site	Thu 05-Jan-23	Thu 05-Jan-23 1 0%																																				
33 Internal Works completed for Advent Sunday 2023	Thu 05-Jan-23	Fri 01-Dec-23 237 0%																					1															

### Top Tips

- Allow a reasonable element of time as a buffer throughout the project.
- Identify key milestones for critical decision-making meetings and align programmes accordingly.
- Consider the impact of potential closure on the organisation.
- Make sure stay on programme check with regular meetings and updates.

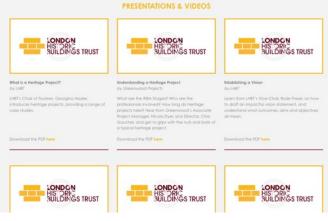


#### Links and Resources

- Heritage Trust Network (free for Groups!)
   https://www.heritagetrustnetwork.org.uk/
- RIBA Plan of Work
   https://www.architecture.com/knowledge-and-resources/resources-landing-page/riba-plan-of-work
- National Lottery Heritage Fund (Small grants) <a href="https://www.heritagefund.org.uk/funding/national-lottery-grants-heritage-3k-10k">https://www.heritagefund.org.uk/funding/national-lottery-grants-heritage-3k-10k</a>
- Architectural Heritage Fund (Viability and Development Grants) <a href="https://ahfund.org.uk/">https://ahfund.org.uk/</a>
- National Churches Trust (various grants) https://www.nationalchurchestrust.org/
- LHBT Training Hub (free for all!)

  https://londonhistoricbuildings.org.uk/index.php/se
  rvices-assistance/training-resources-rs/







## Q&A



#### Get in Touch!

- LHBT can offer free advice to groups, trusts working on a heritage project in London
- Consultancy
  - Bespoke training and workshops
  - Specific project development support
- HOW TO Training sign up



Transforming places for local people.

