

OUTLINING THE PROCESS

SECTION 2

YOUR NOTES

OUTLINE THE THE PROCESS

Phase 1: Pre-Design Planning

Step 1: Needs recognition & initial action

Step 2: Strategic planning for ministry & growth

Step 3: Property and building assessment

Step 4: Master Planning

Phase 2: Project Design & Fund Raising

Step 5: Building project programming

Step 6: Capital campaign

Step 7: Preliminary design

Step 8: Design development & construction documents

Step 9: Bidding/Negotiation

Phase 3: Construction

Step 10: Construction

Step 11: Completion of construction

Phase 4: Ownership

Step 12: Post-Construction

CHECK LIST

Phase 1: Step 1 (2-3 months)

Needs recognition and initial action

- Something has to be done
- Identify broad areas of need
- Report findings
- Form steering committee
- Train the committee
- Start a communication/promotion plan

Phase 1: Step 2 (2-4 months)

Strategic Planning for Ministry and Growth

- Study the community
- Study the church
- Review, or create, a purpose and mission statement
- Establish a strategic plan
- Obtain church approval
- Establish a strategic plan
- Obtain church approval

Phase 1: Step 3

(2-4 months, concurrent with Step 2)

Property and Building Assessment

- Obtain site survey
- Obtain accurate floor plans of existing buildings
- Identify current space use
- Assess structure and building systems
- Do capacity and functional gap analysis
- Assess property adequacy – **Obtain environmental assessment**
- Inventory FF & E (Furniture & Equipment)
- Make preliminary assessment for finances
- Obtain congregational approval to prepare master plan

Site Options

Phase 1: Step 4 (2-6 months)

Master Planning

- Select and hire master planner
- Prepare master plan for property and facilities
- Concept design for first phase
- Cost estimate for first phase
- Presentational/promotional materials
- Obtain church approval and authorization to hire architect and fund raiser

Phase 2 Step 5 (1-3 months)

Building Project Programming

- ❑ Select and hire architect
- ❑ Develop architectural program statement
- ❑ Select and retain a fund raiser
- ❑ Secure tentative commitment from lenders
- ❑ Prepare a comprehensive project budget
- ❑ Obtain church approval to proceed with project design and fund raising

Phase 2 Step 6 (3-4 months, can overlap Step 5)

Capital Campaign

- ☞ Conduct capital campaign
- ☞ Revise project scope if needed
- ☞ Update lender
- ☞ Obtain church approval to proceed

Phase 2: Step 7 (1-2 months, can overlap Step 6)

Schematic Design

- ☞ Architect prepares schematic design
- ☞ Establish tentative project schedule
- ☞ Obtain preliminary cost estimate
- ☞ Adjust scope as needed

Phase 2: Step 8 (3-6 months)

● Design Development and Construction Documents

- ☞ Work with architect, including selection of major materials, systems, and finishes
- ☞ Obtain church approval for any major changes
- ☞ Prepare list of FF & E and establish budget
- ☞ Make organizational changes: enlist and train
- ☞ Prepare maintenance and operations plans and budget
- ☞ Plan for impact of construction period
- ☞ Update project budget and schedule

Phase 2

Step 9 (1 month; could occur earlier)

Bidding /Negotiation

- ☞ Select potential bidders and solicit bids
- ☞ Select contractor
- ☞ Obtain church approval to enter into contract
- ☞ Secure construction loan and finalize plans for permanent financing
- ☞ Award contract(s) for construction
- ☞ Secure bonding, insurance

Phase 3

Step 10 (3-12 months)

Construction

- ☞ Obtain permits
- ☞ Plan and conduct ground breaking ceremony
- ☞ With the architect, monitor progress
- ☞ Order FF & E and arrange for delivery
- ☞ Make progress payments
- ☞ Publicize progress
- ☞ Continue organizational planning and training
- ☞ Hire and train any new custodial staff

Phase 3

Step 11 (1-2 months, may overlap Step 10)

Completion of construction

- ☞ Plan high attendance emphasis for grand opening
- ☞ Close construction loan and roll over to permanent financing
- ☞ Activate new property insurance coverage
- ☞ Make final inspection(s)
- ☞ Obtain Certificate of Occupancy
- ☞ Inspect and install FF & E
- ☞ Obtain operational information and warranties
- ☞ Obtain "as built" drawings; store safely
- ☞ Make final payment to contractor

Phase 4

Step 12 (12 months; ongoing)

Post-Construction

- ☞ Plan, publicize and conduct open house/dedication
- ☞ Schedule 11-month inspection; conduct
- ☞ Evaluate experience, receive feedback from users
- ☞ Identify milestones that will activate next phase
- ☞ Dissolve and thank committees involved