



Advisory Committee on Property

Guidelines for Trustees & Meetings

In the past, most area and local meetings often had practical experience available either from within the construction industry or from Friends in business used to organising such things. The position currently has to be flexible.

This fact was acknowledged several years ago with the formation of a Property Care Group, which drew from the wide experience of members with industry experience. This resulted in the first issue of the *Care of Meeting Houses* book. After publication, it was felt there was a need for a committee to advise meetings and Friends. This was formed as the Advisory Committee for Property.

This committee has been asked to prepare guidelines for projects. These guidelines are set out below:

Projects fall into two main categories:

1. **Major**, which we suggest would include any works requiring planning permission, new buildings, listed building consent, structural alterations and/or subsidence. These may be relatively cheap or expensive but what they share is the need for professional advice and help. First, look around the meeting(s) and see if that is available locally. Secondly, ask the Advisory Committee for guidance. Do this early. Lastly, choose wisely in order to try and obtain the best result.
2. **Minor** or predominately maintenance.

Major

- Consider all aspects of the project. This would include finding a suitable site if necessary; capital assets and or fundraising. Carefully decide on the immediate needs then try and decide longer-term probabilities.
- Prepare a detailed and considered brief for professionals to understand these factors. It is wise to discuss this as widely as possible.
- Interview architects and/or surveyors with whom you feel have a sympathetic understanding of your needs, based on preliminary discussions.
- At a very early stage establish fees and terms of engagement to specify exactly what service is being offered, which you can relate and discuss to your requirements. For instance, you may need a structural engineer, and/or other consultants, and it may be helpful to establish whether the architect has working relationships in these areas.
- Prepare a presentation to area meeting in sufficient detail for an outline approval to be given.

- Architects and surveyors will offer feasibility studies for you to consider. They will usually quote a fee for this, though for some schemes that initial fee may be zero.
- Appoint Friends from within the local meeting and/or area meeting to accept the responsibility of overseeing the project. For major projects this needs to include expertise from within the construction industry. If this is not available locally it may be necessary to buy this expertise in as a project manager or client representative i.e. independent of the construction team and whose primary responsibility is to get the best possible result for the Society.
- Pre-planning is very worthwhile. It is also quite acceptable to ask for referees and examples of work to view for those you are considering employing.

At this juncture you will have decided a number of matters including appointing some of the professionals you will need. If you know the appointed architect or surveyor, the level of trust will be more easily established. If you are appointing an unknown individual then it is important to establish the right lines of communication at an early stage. Make sure minutes of every meeting are kept and agreed. Determine a programme for all aspects of the work, which can be amended and honed as various stages are reached. For very tricky works, consider a critical path programme so that everything from appointments to planning and difficult materials are outlined to make progress more efficient and cost effective. The very last problems you need are delays, amendments and additional works, as these cost a disproportionate amount of money and are hard to control.

Minor

- For minor works many of the above stages are also applicable but in moderation. To undertake this responsibility property committees need to make themselves familiar with a whole raft of regulations such as gas, electricity and legal. The current *Care of Meeting Houses* book and the Britain Yearly Meeting website (www.quaker.org.uk) are very helpful.
- We would add another special 'advantage' to seek. Establish a special relationship with a local builder and/or tradesmen whom you can trust to look after the Society's and the meeting's interests. I will explain this point a little better later.
- Finally, be prepared in this case to supply a detailed specification or list of the work to be done so that quotes from 2 or 3 contractors can be effectively compared.
- If the meeting can build up a relationship with a reputable contractor for these minor works, that trust can be extended, enabling work to proceed quickly and with confidence. Often it is better to trust someone you know rather than to seek the cheapest quote.