

2020-12-30

THE ALMONRY HIGH STREET BATTLE TN33 0EE

COMMENTARY ON PROJECT MANAGEMENT

The complaint to Battle Town Council's Auditor cites a failure to follow standard project management procedures as resulting in substantial abortive expenditure.

This document considers whether there are *standard* project management procedures and whether or not, as far as I am aware, project delivery to date followed any such standards.

In August 2019 I was asked to give advice to the Council's Almonry Working Group on the timetable for obtaining tenders for the refurbishment and extension project. On 5 September I attended a meeting with the working group, the appointed architect and quantity surveyor. Subsequently I continued to give advice to the working group as requested. Although I am a qualified and experienced project manager I am not appointed as such and my role has been advisory, not executive.

I make no comment on project expenditure prior to my advice being sought other than that expenditure up to the end of FY 2018/19 would have been audited for those years. The complaint might therefore only be relevant to FY2019/20 currently to be audited.

The quantum of abortive expenditure for FY2019/20 is set out in a separate document.

My commentary on project management aspects of the complaint are as follows.

Project Management as a discipline identifies three aspects of project delivery all of which must be managed. These are time, cost and quality. Time and cost are self-explanatory but qualities required of the project's product are not. Qualities may be articulated quantitatively as the spatial requirements for particular activities, performance requirements of building fabric, including robustness and longevity, compliance with legislation and compliance with adopted national and local policy. The appropriateness of a particular procedure will depend on whether all three aspects of project delivery have equal importance or whether one or two have higher importance.

Two management procedures which might be cited as standard for a project such as the Almonry refurbishment and (originally proposed) extension are:

- The Body of Knowledge of the Association of Project Management: this has a recognised professional qualification: APMP
- PRINCE2: a structured project management method with practitioner certification

APM and PRINCE2 emphasise the importance of dividing projects into manageable and controllable stages. For a repair and/or building project, the work stages in the RIBA's Plan of Work would be considered manageable and controllable.

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| 0 - Strategic definition | 4 - Technical design |
| 1 - Preparation and briefing | 5 - Manufacturing and construction |
| 2 - Concept design | 6 - Handover |
| 3 - Spatial coordination | 7 - Use |

At the time of the complaint stages 0 to 3 have been completed and stage 4 partially completed to a suitable degree for obtaining tenders. Stage 5 has been initiated by the

invitation of competitive tenders. Stages 2, 3 and tendering in Stage 5 have been repeated in response to public consultation and the Council's response to the changed circumstances of the Coronavirus pandemic. These factors prompted reduction in the extent of concept design and spatial coordination. For Stage 5 the outturn cost of the original scheme and the reduced scheme without extension has been estimated and compared with previous estimates

This project history is not unusual. It is rare for a project to proceed without need for its original programme, cost and brief, to be amended to respond to events during project delivery. The ability of a plan to be amended is an indication of its robustness.

The complaint refers to the vagueness of terms such as *vision* and *aspiration* but these are intrinsic to Stage 0 strategic definition. Only when these have been articulated can briefing of project deliverers begin, and then cost and time for project delivery estimated. Stage 1, preparation and briefing, had fleshed out the vision and aspiration, by setting out the time, quality and cost parameters for project delivery. This project stage was completed more than two years prior to the audit year in which the complaint is now made.

In the current audit year some expenditure has become abortive because of the decision to re-scope the project without extension.

Costs of invitation of competitive tenders have been substantially born by tenderers. Professional fees associated with tendering and then re-tendering the reduced scope scheme would not be substantially abortive since they have replaced estimated costs with certainty of tendered costs.

I appreciate that those raising the complaint do not consider that there would be any benefits that extended accommodation might deliver. However it is uncertain whether they represent an actual majority of local opinion.

From my understanding of the project since my involvement as advisor, and in reviewing its history, I cannot concur with the complainant's summary that project management practice, or non-adherence to 'standard' practice directly incurred substantial abortive expenditure.

Stephen Gray MSc Dip Arch APMP ACIfA IHBC (RIAS RIBA retired)

In addition to professional qualification as an architect I am a qualified project manager, with professional accreditation by the Association for Project Management (APMP). I was awarded one of the first Certificates of Project Management by the Royal Institute of British Architects and was joint-convenor for initiation of the RIBA Project Management Special Interest Group.

With the DoE Property Services Agency I managed construction projects on the MoD estate with an annual spend of approximately £150 millions. In private practice from 1988 I managed many projects for substantial historic buildings, appointed jointly as project manager and architect.

My election to membership of the Institute of Historic Building Conservation and as Associate of the Chartered Institute for Archaeologists, was endorsed, *inter alia*, for my experience in management of significant conservation project for historic buildings.