

2023

The Property Stewards' Handbook

A guide for those undertaking the role of property steward at church, circuit, district or connexional level.



Foreword

Friends in Christ,

I am delighted to introduce this *Property Stewards' Handbook* and firstly would like to thank you for answering the call to serve in this role in the life of the Methodist Church.

Within the connexional identity of the Methodist Church, office holders with common callings in different parts of the Church are able to support and to learn from each other. One of those critical offices is that of the local church or circuit property steward. This handbook draws on and shares the collective wisdom of those who hold or have held that office.

Yours is an essential role in supporting local churches to fulfil their calling through the opportunities and challenges faced in using the physical resources of the Church in response to Our Calling, to enable worship, learning and caring, service and evangelism across the Connexion.

Much of the work that you will carry out, and to which this handbook provides a helpful guide, will focus on the tasks and practical responsibilities of a property steward. However, the skills and experience you will bring to the role is vital to supporting the wider Church and ensuring that the ground is prepared for mission and ministry to flourish.

As you go forward in your role, I hope and pray that you may know the guidance of the Spirit in all that you do and find joy in your share of Our Calling.



The Revd Dr Jonathan R Hustler
Secretary of the Methodist Conference

Contents

Introduction	4
Methodist Structure	5
New to Property?	6
Responsibilities.....	7
Top Ten Essentials of Being a Property Steward.....	10
1. Annual building inspections	10
2. Annual Property Schedules>Returns	11
3. Periodic risk and compliance inspections	11
4. Quinquennial Inspections.....	13
5. Manses	14
6. Repairs.....	15
7. Consents.....	16
8. Listed buildings, buildings in conservation areas and heritage objects	17
9. Property projects	19
10. Legal matters	20
Other Useful Information.....	22
Contact Us	23
Keeping in Touch.....	24
Appendix 1: A Property Steward's Year.....	25
Appendix 2: A Methodist Way of Life	26

Latest Standing Orders

Introduction

The Property Stewards' Handbook is a working document. The Standing Orders quoted are from the 2023 edition of *The Constitutional Practice and Discipline of the Methodist Church (CPD)*. *CPD* is updated every year so these may change. It is important to check the most up to date Standing Orders by viewing or downloading the most recent edition at methodist.org.uk/CPD

This handbook is to be read in conjunction with the current edition of *The Constitutional Practice and Discipline of the Methodist Church (CPD)*. If there is any conflict, ambiguity or discrepancy between the two documents, *CPD* must be followed.

Please note that in this handbook, the word 'must' indicates an obligation under *CPD*, the law or both, whereas the word 'should' indicates good practice. This handbook has been checked by the Conference Officer for Legal and Constitutional Practice for accuracy. This resource is not exhaustive. It must be read alongside, and is not a substitute for, *CPD*.

Web links

Most web links in *The Property Stewards' Handbook* are short-cut addresses to the web pages which contain the relevant information, documents or templates to avoid broken links.

Our Calling¹

The calling of the Methodist Church is to respond to the gospel of God's love in Christ and to live out its discipleship in worship and mission. The Church exists to:

- increase awareness of God's presence and to celebrate God's love (Worship)
- help people to grow and learn as Christians, through mutual support and care (Learning and Caring)
- be a good neighbour to people in need and to challenge injustice (Service)
- make more followers of Jesus Christ (Evangelism).

¹As adopted by the Methodist Conference, 2000.

Methodist Structure

Every Methodist church is in a circuit. Each circuit consists of a group of local churches served by local preachers and ministers, including the superintendent.

Every circuit is in a district, led by a district chair. In 2023 there are 29 districts in the Methodist Church. A list of districts and their websites can be found on methodistchurch.org.uk/Districts

Together the local churches, circuits and districts of the Methodist Church in Britain form the Connexion. But the Connexion is far more than a structure. It is an expression of belonging that expresses and witnesses to “a mutuality and interdependence which derive from the participation of all Christians through Christ in the very life of God” (‘Called to Love and Praise’, Methodist Conference, 1999, para 4.6.1).

Connexionalism is therefore a way of being Christian, in that all Christians are linked to one another, and no church, circuit or district is or can be an autonomous unit (see ‘The Gift of Connexionalism in the 21st Century’, Methodist Conference, 2017). This can best be seen in the Methodist Conference, which meets in a different location each summer. Members are elected from each Methodist district, along with some who are elected by the Conference, representatives of connexional and other bodies, and representatives from the United Methodist Church and the Irish Methodist Conference. The Conference is a place of Christian conferring, and is the supreme decision-making body of the Church.

As a property steward, although the focus of your work may be at local church level or a specific building, it is always within the context of the circuit, district, and the whole of the Connexion.

New to Property?

We are delighted to know that you have agreed to take responsibility for some, or all, of the property aspects of your local church or other property in the trusteeship of the Church. The role of property steward at both local and circuit level is a vital role of service within the Methodist Church.

After our people, our properties are one of the biggest assets to enabling mission. A Methodist building that is welcoming, eye-catching and that acts as a focal point for community engagement can speak powerfully of God's love for all. The Connexional Team can help you if you are considering how you might use a property for mission. Utilising a property, either by redeveloping it for ministry and social purposes or incorporating a range of social uses into an existing building, is as much a part of a mission plan as preaching, worship or community evangelism. There is encouragement connexionally for how churches are to review their property in this context, through guidance which sets out key priorities to enable effective use of property for mission. The current **Strategic Guidance for the Use of Property in Mission** can be found on methodist.org.uk/Property/Mission

We have set out in the following pages the key aspects for the role and where to look for further guidance and information. The guidance focuses specifically on property matters and although written for church property stewards, is intended to be as equally relevant and helpful to those looking after circuit, district or connexional properties. Please note that this guidance does not remove the responsibility of the users to ensure that any legislation, good practice and technical data referred to herein is current.

We desire this document to be accessible and concise, therefore we have not reproduced large portions of *The Constitutional Practice and Discipline of the Methodist Church (CPD)*. Where a particular Standing Order is referenced you should refer to the latest edition of *CPD* which can be found on methodist.org.uk/CPD

Responsibilities

Managing Trustees

Most property stewards are members of the Church Council and therefore, by default, are Managing Trustees, who have the same responsibilities as the trustee of any charity. In particular, they are personally responsible for their actions as a trustee, and they must ensure that they manage the trustees' affairs prudently, and take proper professional advice where they feel that they are not competent. For further information, please see our web pages on Managing Trustees: methodist.org.uk/ManagingTrustees

Church property stewards

The duties of property stewards in a local church are many and varied, and should be periodically confirmed at Church Council meetings. The specific term 'property steward' is not mentioned in Standing Orders, but SO 941 describes their general duties. There may also be a property sub-committee, if the Church Council considers this necessary. Church property stewards will report to either of these committees on matters of church inspections, building projects and repairs. Those looking after circuit, district and connexional property (see below) will submit their reports to the committee that has managing trusteeship.

The Managing Trustees may delegate or employ a competent person to look after day to day matters. Support for contracts may be found on methodist.org.uk/LayEmployment. It is worth noting that all contracts of employment must be approved by the district as per SO 438A.

SO 941 sets out the requirements of the local church when looking after Methodist property and the property steward oversees this. This is summarised below:

1. Regular reporting on the condition of the property and facilitating any repairs and ensuring consent is obtained for the repairs, if required (SO 930).
2. Prepare and submit the Annual Property Schedules which include the accounts, investments and state of the property.
3. Carefully reviewing the Quinquennial Inspection Report and making an action plan for recommendations. It is the responsibility of the circuit to arrange and cover the costs of the Quinquennial Inspection.
4. Ensure that the log book (or a dedicated filing system) includes Annual Property Schedules, Quinquennial Inspection Reports and other relevant repairs or alterations.
5. Annually present a report about the property to the Church Council and to the Circuit Meeting, including how the recommendations of the Quinquennial Inspection Report are being implemented.
6. When appropriate, facilitate the purchase, sale, extension or alteration of the properties.
7. If required, employ a caretaker or maintenance person to look after the premises.
8. Ensure that all residential property not being used as a manse is not being occupied without a binding written agreement, where such use is not dealt with as part of employment. This could include the occupancy by a caretaker, cleaner, youth worker or

Circuit property stewards

other lay worker (SO 929). Please consult with your District Lay Employment Secretary. Further information can be found on methodist.org.uk/LayEmployment

SO 952, SO 953 and SO 954 set out the requirements for properties managed by the circuit. A circuit steward oversees this. A summary is listed below:

1. In relation to all circuit property, arrange for a Quinquennial Inspection every five years, which includes a timber decay inspection, to be conducted by a professionally qualified person and report the recommendations to the Circuit Meeting.
2. Arrange for an inspection of local and circuit property each year, except when a Quinquennial Inspection or the District Manse Committee visitation has taken place within 12 months.
3. Carefully review the Quinquennial Inspection Report and make an action plan for recommendations ensuring the external painting and internal decoration are suitable.
4. Send a copy of the Quinquennial Inspection Report on circuit property to the District Property Secretary.
5. Receive and review the reports from the District Manse Committee and report on what action the circuit has taken.
6. Make an action plan of repairs and refurbishment for manses after examining their condition and bearing in mind the recommendations from the Quinquennial Inspection Report and District Manse Committee Report.
7. Ensure that the log book includes Annual Property Schedules, Quinquennial Inspection Reports, District Manse Committee Reports and other relevant repairs or alterations.
8. Prepare and submit the Annual Property Schedules which include the accounts, investments and state of the property.
9. Ensure that all residential property not being used as a manse is not being occupied without a binding written agreement, where such use is not dealt with as part of employment. This could include the occupancy by a caretaker, cleaner, youth worker or other lay worker (SO 929). Please consult with your District Lay Employment Secretary. Further information can be found on methodist.org.uk/LayEmployment
10. Prepare a budget of expenditure for each property to be brought up here and maintained at the connexional standard as described in *CPD*, Part 2, 'Guidelines on Provision of Adequate Accommodation for Manses'.
11. Annually review the finances for the property.
12. Review the location and cost of maintenance for each manse at least every four years and decide if it would be prudent to purchase a new manse or reinstate a former manse.
13. Ensure all decisions and any action taken regarding the property is documented. Documentation should be sent to the superintendent, copies sent to the senior circuit steward and a copy placed in the log book.

District managed property

SO966 sets out the requirements for properties that are managed by the district. A district property steward oversees this. A summary is listed below:

1. Ensure that the log book includes Annual Property Schedules, Quinquennial Inspection Reports, manse visitations reports and other relevant repairs or alterations.
2. Arrange for a Quinquennial Inspection Report for all District Model Trust properties, ensuring that the timbers are inspected, and carefully review the report and make an action plan for recommendations (unless the property is on a full repairing lease term of ten years or more).
3. Ensure that all residential property not being used as a manse is not being occupied without a binding written agreement, where such use is not dealt with as part of employment. This could include the occupancy by a caretaker, cleaner, youth worker or other lay worker (SO 929). Please consult with your District Lay Employment Secretary. Further information can be found on methodist.org.uk/LayEmployment
4. Follow the requirements of Standing Orders if the property is a Methodist International House or other international student hostel.

Connexional property

SO 96A0 sets out the requirements for properties that are managed by the Connexion. A summary is listed below:

1. Arrange for a Quinquennial Inspection Report for all Connexional Model Trust properties, ensuring that the timbers are inspected, and carefully review the report and make an action plan for recommendations (unless the property is on a full repairing lease term of ten years or more).
2. Ensure that all residential property not being used as a manse is not being occupied without a binding written agreement, where such use is not dealt with as part of employment. This could include the occupancy by a caretaker, cleaner, youth worker or other lay worker.

Top Ten Essentials of Being a Property Steward

1. Annual building inspections

Building inspections should occur once a year on all properties that are held on the Model Trust. A dedicated time should be set aside to undertake this, to ensure that all areas of the building are inspected for potential defects or maintenance issues. Addressing a building issue early on will save both time and money in the long-term. Also, refer to section 6, 'Repairs', for further guidance.

There is a church and manse inspection checklist and an accompanying guide found on methodist.org.uk/Property/Forms. Once the checklist is completed, report to the Managing Trustees and make an action plan for any repairs or maintenance issues that have been observed. It is good practice to share the checklist with the minister.

A copy of the annual inspection and a schedule of work carried out to a property should be kept in the log book. The log book should be kept in a known, fire-proof, safe and secure place that is easily accessible. If you are unable to find a log book, then one should be created as soon as possible. A template for a log book can be downloaded at methodist.org.uk/Property/Forms

If the whole or part of a building is used or occupied by a third party, there are certain legal inspections which are required by law. Please refer to Trustees for Methodist Church Purposes' (TMCP) guidance on third party use (tmcp.org.uk/property/letting-property-and-third-party-use), including the landlord checklist for residential lettings of manses on tmcp.org.uk/property/letting-property-and-third-party-use/ast and the landlord checklist for non-residential leases on tmcp.org.uk/property/letting-property-and-third-party-use/leases as well as the guidance on licenses that can be found on tmcp.org.uk/property/letting-property-and-third-party-use/licenses

If a property is on a long-term (ten years or more) full repairing lease, then as landlord, the Managing Trustees should keep an eye on the property, both to exercise their rights under the lease to inspect and request the tenant carries out repairs and to keep on top of any repair obligations on them as landlord.

Top tip: There are other resources which may be useful to keep on top of the annual maintenance and inspections. A **Maintenance Plan Checklist** and **Maintenance Calendar** can be found on methodist.org.uk/Property/Conservation/Maintenance. The Society for the Protection of Ancient Buildings (SPAB) have created helpful videos that can be found on spab.org.uk/campaigning/maintenance-matters. There is plenty of choice when it comes to creating a maintenance plan but the aim is make sure that all aspects of the building are checked regularly and methodically.

2. Annual Property Schedules/Returns

Once an annual building inspection has been completed, please use the information to populate the Annual Property Schedule. It is recommended to have completed the annual inspection checklist and the Annual Return before the autumn meeting of the Church Council so that the reports can be approved before being submitted to the circuit. Each Church Council is required to approve the completed schedules relating to its own property.

Please be aware there is a **Managing Trustee Annual Checklist** to help check that the managing trusteeship obligations are being fulfilled. It can be found on methodist.org.uk/Property/Forms

- **Schedules A** concerns the state of the church property. The form and a copy of the annual inspection checklist should be submitted on the Annual Returns section on online.methodist.org.uk/Login
- **Schedule C** covers all circuit property. The form and a copy of the annual inspection checklist should be submitted on the Annual Returns section of online.methodist.org.uk/Login
- **Schedule D** is a report on outstanding items such as insurance, safeguarding and overdue Quinquennial Inspections. This can be viewed on online.methodist.org.uk/Login
- **Schedule E** is the Quinquennial certificate and report summary for manses from the Quinquennial Inspector. This can be downloaded at methodist.org.uk/Property/Forms
- **Schedule G** is the Quinquennial certificate and report summary for chapels and ancillary buildings from the Quinquennial Inspector. This can be downloaded at methodist.org.uk/Property/Forms
- **Schedule 14a** is for the use of Model Trust property by other churches or congregations and can be accessed on methodist.org.uk/SharingOfBuildings
- **Licences** for regular part-time, non-exclusive use and letting of Methodist property by third parties can be found on tmcp.org.uk/property/letting-property-and-third-party-use/licences

Information for registering and logging on, as well as updates and guidance documents can be found on methodist.org.uk/OnlineSuite

Top tip: It is easier to conduct a building inspection during the summer due to the longer days.

3. Periodic risk and compliance inspections

In addition to the annual inspection of the fabric of the building, there are some inspections which occur more regularly or in addition to the annual inspection. Some are recommended by insurance providers as a way of managing risk, while some are required under Health and Safety legislation or by the Charity Commission, which requires each charity to check, review and update all risk policies as part of the Trustees Annual Report. Managing Trustees have a duty to avoid undue risk. Methodist Insurance have a range of resources on risk management

that can be found on methodistinsurance.co.uk/risk-management. As well, you can find additional guidance on how to carry out inspections on methodist.org.uk/Property/Inspections

Church buildings

Health and Safety

Annual inspections

- Fire extinguisher
- Fire risk assessment
- CO2/Smoke detector
- Gas inspection
- Health and Safety risk assessment
- Burial ground maintenance

Other regular inspections

- Asbestos – every six months to one year depending on type and location
- PAT testing – six months to one year depending on the appliance
- Food Safety and Kitchen Hygiene – six months to five years depending on usage
- Electrical inspection (also known as a hard wire inspection) – every five years
- Empty properties – weekly if empty
- Legionella – dependant on water system and building usage

Risk management (annually)

- Tree management
- Security
- Event risk assessments, including Christmas events
- Empty buildings
- Ladders and working at height
- Water pipes and heating
- Slips and trips
- Working alone
- Flood safety
- Lightning protection – dependant on a risk assessment

Manses

Health and Safety

Annual inspections

- Gas inspection
- Fire safety
- CO2/Smoke detector

Other regular inspections

- Electrical inspection (also known as a hard wire inspection)– every five years
- PAT testing on office equipment – six months to one year
- EPC – every ten years
- Legionella – dependant on water system and building usage

Risk management (annually)

- Security
- Empty properties

Top tip: Methodist Insurance has a risk calendar that covers areas that should be checked annually. It can be downloaded at methodistinsurance.co.uk/risk-management/risk-calendar

4. Quinquennial Inspections

The Quinquennial Inspection is the foundation for looking after any property. It is a thorough inspection conducted by a suitably qualified professional who will give an overall health check of the building and help the church plan for future repairs and expenditure. A Quinquennial Inspection should be undertaken every five years for all properties, including manses and ancillary properties, under the trusteeship of the Methodist Church (be it church or circuit), even buildings that are not in use. The only exception would be if the property is no longer required for a Methodist purpose and it has a full repairing lease for ten years or more. It is the responsibility of the circuit to arrange and pay for the inspections in conjunction with local trustees. If the building is listed, it is vital that accredited professionals are appointed for the inspections. Further information about obligations can be found in SO952. A full set of guidance on Quinquennial Inspections that includes helpful tips on choosing an inspector, preparing for an inspection, what to expect during an inspection and useful templates can be found on methodist.org.uk/Property/QI

If a building is listed, further advice on appointing an inspector and other professionals can be found on methodist.org.uk/Conservation/Professionals

A good Quinquennial Inspection Report will provide a full assessment of the condition of the property, setting out individual repairs and maintenance requirements from immediate action up to suggested works over the following Quinquennium. They will normally be accompanied by approximate budget costs for each item. It is important that the property steward and the Managing Trustees thoroughly read the report and make an action plan based on the recommendations in order to prevent any defects from escalating. In order to assist the treasurer with budgeting for property works, it is recommended that quotations are obtained for works proposed as part of the report.

For clarification on the need for any formal permissions required as a result of the Quinquennial Inspection on a listed building or building in a conservation area, please speak to the Connexional Conservation Officer.

Top tip: A circuit could potentially make savings by using the same inspector for a number of properties in the circuit or through an arrangement during the year. It would be worth asking the inspectors invited to tender for any work whether such a discount is possible. It is good practice to share the recommendations of the inspection with the minister.

5. Manses **Charter for Outgoing and Incoming Ministers**

The Conference has agreed a Charter for Outgoing and Incoming Ministers (*CPD*, Book VII, Part 1), which sets out what those moving into a manse can reasonably expect. When a manse changes over occupancy, it should be ready in good time to be a place of welcome for the incoming minister. The circuit property stewards are responsible for ensuring the quality of the interior decoration, furnishing and energy efficiency of the manses. When considering the appropriate standard of decoration and furnishing it can be useful to ask: 'What is the best welcome we could offer?' and then aim for that. More information can be found on methodist.org.uk/Property/Manses

Energy efficiency

The Conference of 2010 directed that circuits should endeavour to use Model Trust money to put in place high standards of energy efficiency and should endeavour to provide smart meter devices that enable better control of electricity use. *CPD*, Book VII, Part 2, para 3 states that an incoming minister should be provided with a current Energy Performance Certificate (EPC) and that circuits should seek a minimum of a 'C' energy efficiency rating. Further guidance about EPCs can be found on methodist.org.uk/Property/Manses and there is guidance on ways to improve energy efficiency on methodist.org.uk/Property/NetZero

Empty manses

If a manse is empty for more than a short period, you should let your insurer know as this could affect the validity of the policy. You can find out more information about looking after empty properties on methodist.org.uk/Property/A-Z

Letting out manses

When a decision is made to rent a manse to a third party, landlord and tenant law must be followed. Please note that ministers are not tenants. The TMCP web pages have guidance on this subject on tmcp.org.uk/property/letting-property-and-third-party-use, including a checklist setting out the charity law. Methodist law and policy requirements to be fulfilled before letting out a residential property can be found on

tmcp.org.uk/property/letting-property-and-third-party-use/resources/checklists/cl-granting-a-residential-tenancy-checklist

You should also contact your insurer to update your policy.

Please note that these lettings must be reviewed every two years. Consent lasts up to two years where a new letting is entered into with the same tenants within that two years, but it must be given again after two years has expired (even if the tenants remain the same). If the tenants change during the two years, then consent must be given to the new letting in any event.

It is also worth noting that the primary purpose of manses is to provide accommodation for ministers who are required to be itinerant. Priority should always be given to manses for mission rather than generating income.

Top tip: It is suggested that a Quinquennial Inspection of a manse takes place in the early part of the final year of a minister's appointment, as this will help to inform what work needs to be carried out before a new minister begins their appointment.

6. Repairs **Log book**

It is important that the property steward notes any repairs that are undertaken in the log book. A log book is a record of what work was done and when. It should include worksheets, invoices, guarantees, inspection certificates and other documents. The Quinquennial Inspector will ask to see the log book as part of the inspection process and it will be a useful handover document if someone takes over the property steward role. A template for a log book can be found on methodist.org.uk/Property/Forms. Depending on the nature of the repairs, consent may also be needed. Refer to the section 7, 'Consents', for further information.

Procurement

When appointing a contractor for any type of work, it is standard practice to obtain a minimum of three quotations. For more complicated repairs, it may be worth speaking to the Quinquennial Inspector about the repairs and quotes. Further advice on best practice in procurement can be found on methodist.org.uk/Property/A-Z

Funding

If the repairs are substantial and beyond the resources of the church, there are some potential avenues to explore for funding. Firstly, it is worth approaching the circuit and district as often there are funds available. TMCP and Methodist Insurance also offer discretionary grants for repairs. More information can be found on methodist.org.uk/Property/Grants

It is important to note that some funders will only support repairs where there is oversight or the involvement of professionals with accreditation. This is particularly relevant for works to listed churches, or churches in conservation areas. Grants are also available to cover the VAT element of repair works to listed buildings, details of this can be found on

[listed-places-of-worship-grant.dcms.gov.uk](https://www.dcms.gov.uk/listed-places-of-worship-grant)

Top tip: When planning repairs, there could be savings by arranging for multiple repairs. For example, if scaffolding is being erected, you could have the guttering and flashing cleared and painted at the same time as the main work.

7. Consents

Property projects requiring consent are described in SO 930 and include all sales and purchases, repairs (but not to furnishings or the execution of non-structural repairs), the grant of leases and residential tenancies, and the creation of sharing agreements and easements. If the work is fairly routine repair and maintenance, and is being paid for entirely from the local church's own finances, no notification or consent beyond that of the Church Council is normally required (although note that this may not be the case for listed buildings, see below).

The **Consents Flow Chart** is a useful tool for ascertaining if consent is needed and it can be found on methodist.org.uk/Property/A-Z. Please note that there could be variation between districts. Districts have full responsibility for giving final consent to all property schemes and these schemes are to be submitted online by churches and circuits. The district property secretaries act on behalf of Synod, who give agreement to the substance of property schemes (refer to SO 930(3)).

If any of the buildings are listed or in a conservation area, the project will require consent from the Connexional Conservation Officer. In these instances, the advice of the Connexional Conservation Officer should be sought at the earliest opportunity. Further details can be found on methodist.org.uk/Property/Conservation

Consent is required via an input of relevant details on the property consents website (online.methodist.org.uk) in the following circumstances:

- If you are obtaining any grants, including from the Circuit Model Trust Fund (formerly known as the Circuit Advance Fund)
- If the funds are not already in your local church's own bank account
- If any legal issues are involved
- If there is to be any new building or structural work.

Guides for using the consents website can be found on methodist.org.uk/OnlineSuite

Top tip: If you log a project on the consents website and it is abandoned, be sure to update the system as this will help with reporting.

8. Listed buildings, buildings in conservation areas and heritage objects

The Connexional Conservation Officer should be contacted at the earliest opportunity when considering any work, including maintenance, repairs or alterations to a listed building or one situated in a conservation area. You can access a wealth of resources, news and funding specific to Historic Places of Worship on methodist.org.uk/Property/Conservation

Please remember that if your building is listed or in a conservation area, then more stringent procedures (or listed building approval) will apply. You should refer to Section 98 of CPD. *Please note again that CPD has no provision for retrospective approval, indeed carrying out unapproved works to a listed building is a breach of trust (see below for further details of enforcement). Thus, it is imperative that you make early contact with the Connexional Conservation Officer before any works commence so they can advise on the need for consent.*

Historic England maintain a list of designated heritage assets and you can check this to see if your property is listed: historicengland.org.uk/listing/the-list. Please note the extent of listing may go beyond that outlined in the list description. Local Authorities designate and maintain a list of their conservation areas, unfortunately there is no national register. Please contact the Connexional Conservation Officer on conservation@methodistchurch.org.uk if you require confirmation of the church's location within a conservation area.

The approval process is administered through the Methodist Church's online consent system (refer to 'Consents', above). You will be asked to raise a project for any works to a listed building if it meets the criteria set out in Section 98 of the Standing Orders. If this applies you will need Section 98 listed building approval, which is issued once your application has been processed in accordance with the process outlined in the Standing Order and any other Code of Practice for Ecclesiastical Exemption. Work on the building should not begin until a Section 98 has been issued. Failure to comply with this is enforceable (SO 985) and would constitute a breach of trust. Flow charts, illustrating the process of obtaining listed building approval process can be found on methodist.org.uk/Property/ConservationFlowcharts

Having the right professional advice is often the key to ensuring swift approval and the appropriate specification of repair work, as well as the development of sympathetic design proposals. Many professional bodies have conservation accreditation schemes, and we strongly encourage you to consult their registers in order to find the right professional oversight for your projects. Further details can be obtained from the Connexional Conservation Officer.

As a consequence of some works of alteration, you may be asked to take a photographic record of the works before and after completion. There is a useful guide on Listed Buildings: Photographic Records and Archives that can be found on methodist.org.uk/Property/Conservation/Guidance-notes

However, it would be sensible to take periodic photographs of both the interior and exterior as a permanent record of the building, which can be used in heritage interpretation or literature commemorating the church. It is also a standard request to take photographs, particularly of the interior, if the church building is no longer in use. This is especially relevant for listed buildings but can apply to all places of worship.

Historic pipe organs need to be regularly maintained and tuned by a professional organ builder, who should be accredited and whose work is regularly assessed for its quality. Consider your

organ when changing your heating system as changes in heating can affect your organ's performance. For advice on routine tuning and maintenance, seasonal schedules and repairs contact the Methodist Church's Church Organ Advisory Service, details of which can be found on methodist.org.uk/Property/A-Z

Following church property closure, circuit property stewards should ensure that the person responsible for the weekly inspection should carry out these steps to keep the organ in good working condition. If an organist is still available in the neighbourhood then they can practise to keep all the action parts moving. The purpose of this is to run through all the stops on all keyboards, and the pedalboard to keep leatherwork from sticking and keep electrical contacts clean. Advice on removal is available on methodist.org.uk/Property/Conservation

Contents and heritage objects

As property steward, due care and attention should be given to property contents that may have historic or heritage value. Our church objects don't have to be purely practical furnishings and decoration but they can provide exciting and inspiring ways to connect with our mission. These could be historic artefacts that help us to connect with the past and learn more about our shared Methodist history – or perhaps you have contemporary objects that tell a heritage story or look to the future.

The Methodist Heritage Committee meets to ensure that these artefacts are protected and to safeguard their future. SO337(1)ii and SO936 provide that artefacts with significant heritage value must not be sold, leased or disposed of without approval of the committee.

A good place to start is to compile an inventory of the church contents you might deem to be historic or have heritage significance. There are guidance documents regarding the following topics available on methodistheritage.org.uk/artefacts.htm and includes useful documents such as:

- **Acquiring new objects**
- **Caring for objects**
- **Assessing significance**
- **Significance assessment grid**
- **Action matrix**
- **Disposing of objects**
- **Features in Listed Buildings**

All War memorials should be recorded on the **War Memorials Register** found on iwm.org.uk/memorials

As set out in SO473 there is a district archivist "whose concern shall be to advise circuits and local churches as to the proper custody or disposal of all documents and records." The Archives Liaison Officer works closely with this network of district archivists and aids to help

identify documents that may have connexional significance. Other key contacts may include Heritage Committee Officer for Historic Collections and Liaison Officer for Historic Objects.

Top tip: It is strongly recommended that all works to listed buildings are discussed with the Connexional Conservation Officer at the earliest opportunity, preferably during the early development phase of your project. A basic overview of the process can be provided and assistance can be given regarding other permissions which may be required, such as planning permission. Advice can also be given on the consultation requirements which may need to be built into your project timetable.

9. Property projects

Starting a property project can be a daunting task but the **Property Development Pathways** have been created to help support Managing Trustees by giving guidance and signposting for further information. Your District Property Secretary may be able to provide guidance when commencing a consent request. The aim is to improve communication and resources for Managing Trustees who are undertaking a property project and also to help support the **Strategic Guidance for the Use of Property in Mission**.

Within the **Property Development Pathways**, there is a core path, which has a common set of steps to follow within every project. This has guidance and considerations that are applicable to all property projects. There are core aspects for each project that should be followed in order to achieve success in both for the mission and the development of the property. There are decision gateways in Step 4 and Step 6 that will allow for time to reflect and confirm that the project remains viable. The pathways offer options and ideas to consider and not all aspects are required depending on the nature of the project. It can be helpful to reflect and consider a property project like a journey – sometimes there is good progress and sometimes the road is bumpy; sometimes a stop is needed along the way; sometimes the map needs to be reviewed; sometimes there is a deviation but the arrival at the destination will have been worth it.

A summary of the eight core steps can be found on methodist.org.uk/Property/Pathways

In addition to the core pathway, there are supplementary pathways for:

- **Conservation and listed buildings projects**
- **Net Zero Carbon projects**
- **Projects that involve a Partnership.**

Within each of these supplementary pathways, there are links that incorporate specific guidance and considerations for these types of projects. You could imagine the pathways like a layered cake where the core pathway is on the bottom and every project should follow those steps. However, one could choose to have a different flavour of cake and include a partnership or environmental project. In theory, there could be a Net Zero Carbon project on a listed building which could involve a partnership and thus, incorporate all four layers.

The information and guidance is there for managing trustees to use as dictated by the parameters of the project.

The pathways are designed to be worked through methodically and have been divided into bite-size steps. Thus, it is recommended to begin with Step 1 of the core pathway followed by Step 1 of a supplementary pathway (if applicable). The first three steps involve a large amount of background work, but allowing time for research, preparation and planning will help to ensure a project's success.

There is also guidance on how to improve the accessibility of a building that can be found on methodist.org.uk/Property/AccessibleBuildings. You can see examples of what other churches have done on methodist.org.uk/Property/Inspiration. For further support, you can contact the Property Support team (property@methodistchurch.org.uk) for advice regarding your project.

Top tip: Planning is crucial for a successful property project, remember that, *"If you fail to plan, then you plan to fail."*

10. Legal matters

Trustees for Methodist Purposes (TMCP) are the custodian trustees for the majority of Methodist Home districts property in England, Wales and Scotland and are available to provide help and guidance to Managing Trustees on property and finance. There are equivalent bodies for the Island districts.

You can visit tmcp.org.uk/property for detailed guidance on:

- The charity law and Methodist law and policy requirements in relation to property matters including:
 - Sales, including the streamlining process (tmcp.org.uk/property/panel-solicitors/streamlining)
 - Purchases
 - Third party use of Methodist premises, including leases and licences and other property contracts
 - Litigation (tmcp.org.uk/property/litigation)
 - Panel solicitors

There are a number of resources available to help you including checklists, flowcharts, template documents, policies, articles and template documents.

TMCP also:

- review, amend and approve legal documents relating to property transactions
- facilitate the legal aspects for sales, purchases and leases of Methodist property
- transmit funds for sales, purchases and building schemes
- check property deeds, rights of access and restrictive covenants
- act as data controller for local churches, circuits and districts and provide guidance and assistance on data protection.

You can contact TMCP directly on legal@tmcp.org.uk or finance@tmcp.org.uk or via tmcp.org.uk/contact

TMCP have created a helpful streamlining process for sales that can be found on tmcp.org.uk/property/panel-solicitors/streamlining

For detailed information and templates for leases and license, please refer to tmcp.org.uk/property/letting-property-and-third-party-use

If churches hire their premises for worship to a non-Methodist congregation, check that the permissions are current and a written agreement is in place. A Schedule 14a must be submitted to the Conference Office for approval, together with a copy of the group's statement of doctrine. Details of the process and the Schedule 14a form are available on methodist.org.uk/SharingOfBuildings. TMCP's Standard Licence for Use of Premises for Christian Worship should be used where possible.

Churches need to be aware of the guidelines in relation to data protection. The Trustees for Methodist Church Purposes website has useful information and guidance at tmcp.org.uk/about/data-protection

If you need general legal advice or to instruct a solicitor to act for you on a property transaction, contact the panel of solicitors. Further information can be found on tmcp.org.uk/property/panel-solicitors

For churches in Scotland, please refer to tmcp.org.uk/property/scottish-property and for churches in the Isle of Man or Channel Islands, please contact TMCP for specific guidance on tmcp.org.uk/contact

Top tip: Please note that the Conference Office can provide guidance on interpretation of Standing Orders and Methodist constitutional practice, but is unable to advise individual local churches on their particular circumstances or legal obligations. The Conference Office are best reached via lcp@methodistchurch.org.uk

Other Useful Information

Property Matters

We have produced considerable guidance on property matters that can be found on methodist.org.uk/Property. Our main communication with circuits and local churches is through Property Matters, which is an online monthly newsletter that includes information on a wide range of topics, guidance and resources. You can sign up on methodist.org.uk/SignUp

Top tip: Previous editions of Property Matters can be found online. Visit methodist.org.uk/Property/PropertyMatters to view more.

Responding to the climate crisis

As churches and circuits look to respond to the climate emergency, a set of practical steps and recommendations have been created to help churches reduce energy usage and associated carbon emissions. The guidance has been divided up into four steps that churches can work through at their own pace, recognising that Step 4 may not be possible for every church. Full details of the four steps, including a case study of how one church moved through all four, can be found at methodist.org.uk/Property/NetZero

Top tip: An energy audit of the building would give recommendations that are specific and relevant to each building. If it is not possible, be sure to ask the Quinquennial Inspector for recommendations for energy efficiency measures. These could be combined with routine repairs and/or building works.

Accessibility

The Methodist Church is committed to Justice, Dignity and Solidarity. We believe that all people are uniquely made in the image of God, and we aim to live this out in the Church and in our communities. You can read more about this commitment in the **Conference report** and the **User Guide** will help you engage with this work. For information about how to help buildings to be more accessible, please look at methodist.org.uk/Property/AccessibleBuildings

Top tip: There is VAT relief for works which assist those who are disabled. Please refer to gov.uk/vat-builders/disabled-people

Closed church buildings

When a church ceases to meet, there are various steps that need to be taken as part of the closure process. The Guidance for Closed Church Buildings was created collaboratively with the aim of providing useful information, checklists and templates to assist with this process. The guidance can be found on methodist.org.uk/Property/A-Z. If the building is to be sold, please refer to TMCP's guidance on tmcp.org.uk/sales

Contact Us

A full list of contacts can be found on:

methodist.org.uk/ConnexionalTeam

Methodist Church House

The Methodist Church,
25 Tavistock Place,
London WC1H 9SF

Tel: 020 7486 5502

Email: enquiries@methodistchurch.org.uk

Property Support

Tel: 020 7467 5271

Email: property@methodistchurch.org.uk

Online Suite Support Team

(Consents and Annual Returns)

Tel: 020 7486 5502

Email:

onlinesuitesupport@methodistchurch.org.uk

Heritage Officer

Tel: 020 7467 5211

Email: heritage@methodistchurch.org.uk

Email: conservation@methodistchurch.org.uk

Connexional Ecumenical Officer

Tel: 020 74467 3529

Email: eo@methodistchurch.org.uk

Conservation Office (for advice on listed buildings and conservation areas)

Central Buildings,
Oldham Street,
Manchester M1 1JQ

Tel: 0161 235 6722

Trustees for Methodist Church Purposes

Central Buildings,
Oldham Street,
Manchester M1 1JQ

Tel: 0161 235 6770

Email: legal@tmcp.org.uk

Web: tmcp.org.uk

Governance and Charity Trustee Queries

Legal and Constitutional Practice Team

The Methodist Church,
25 Tavistock Place,
London WC1H 9SF

Email: lcp@methodistchurch.org.uk

Methodist Insurance

St Ann's House,
St Ann's Place,
Manchester, M2 7LP

Tel: 0345 606 1331

Email: enquiries@micmail.com

Web: methodistinsurance.co.uk

Keeping in Touch

There are several ways to stay in touch with what is happening across the Methodist Church.

Sign up for a range of free newsletters at methodist.org.uk/SignUp

These include:

Property Matters – monthly news on property issues

The Methodist News – weekly news and information digest

Heritage News – bi-monthly heritage news and stories from around the Connexion

Sign up to receive **the connexion** magazine. This is a free print magazine about the life and work of the Methodist Church. It brings together inspirational stories from Methodist people who are passionate about sharing God's love to change lives.

Subscribe at methodist.org.uk/theconnexion

Follow the Methodist Church on:

Twitter [@MethodistGB](https://twitter.com/MethodistGB)

Instagram [@MethodistChurch](https://www.instagram.com/MethodistChurch)

Facebook [@MethodistChurchinBritain](https://www.facebook.com/MethodistChurchinBritain)

Website

A good deal of information is available on methodist.org.uk/Property and it is split into different sections:

Quinquennial Inspections methodist.org.uk/Property/Qi

Regular Inspections methodist.org.uk/Property/Inspections

A-Z Property Guidance methodist.org.uk/Property/A-Z

Property Development Pathways methodist.org.uk/Property/Pathways

Conservation and Listed Buildings methodist.org.uk/Property/Conservation

Guidelines for Manses methodist.org.uk/Property/Manses

Get Your Building Down to Net Zero methodist.org.uk/Property/NetZero

Making Buildings Accessible methodist.org.uk/Property/AccessibleBuildings

Funding and Grants methodist.org.uk/Property/Grants

Property Matters methodist.org.uk/Property/PropertyMatters

Guidance on Church Mergers and Amalgamation methodist.org.uk/ChurchMergers

Appendix 1: A Property Steward's Year

There is no such thing as a set calendar for a property steward as no two churches, circuits or districts function identically with their meetings or allocation of duties. Below is a starting point for circuits to use in creating their own property-specific calendar. Some may not be the direct responsibility of property stewards, but it is useful to be aware of them for church and circuit life.

September

- If new to the role, conduct a handover from previous property steward including:
 - finding the log book and checking when inspections and insurance premiums are due
 - reviewing Health and Safety policies (refer to compliance and risk inspections)
 - checking if any licence or lease agreements need to be reviewed or renewed
 - receiving updates on any property projects
- Attend Church Council

October

- Prepare a report with the Church Council Secretary and present to Church Council
- Affirm the Safeguarding policy*
- Complete Annual Return after report is approved (suggested**)
- Attend Church Council
- Statistics for Mission submissions (suggested**)

November

- Property and finance schedules for circuit and churches due for completion and submission

February

- Preparation for Circuit Meeting in February/March, eg budget for next connexional year, ensuring that the budget set is supported by strategic financial planning

April

- Attend Church Council and general church meetings
- Annual manse visits (suggested)

July

- Attend Church Council

* Annually the Church Council must affirm the Safeguarding policy of the local church. The Church Council **must** appoint a Safeguarding Officer each year, whose name and telephone number must appear (1) on the safeguarding notice board together with the District or Regional Safeguarding Advisors name and telephone number and (2) be noted in the circuit directory and advised to the Regional Safeguarding Officer.

** Due date is 31 January of the following year.

Appendix 2: A Methodist Way of Life

The calling of the Methodist Church is to respond to the gospel of God's love in Christ and to live out its discipleship in worship and mission.

Worship

- What is the pattern of your prayer life?
- How easy or hard do you find it to pray?
- What has spoken to you recently in worship or in the Bible?
- When, lately, have you felt close to God or distant from God?

Learning and Caring

- How have you practised generosity lately?
- How have you shown hospitality to others recently?
- How are you caring for yourself?
- How and what are you learning now?

Service

- How are you seeking to serve others in your communities and beyond?
- What has helped or hindered you in your service of others?
- How are you caring for God's creation?
- How are you using God's gifts (including your financial resources)?
- What issues of injustice are you currently concerned about?
- What are you doing in response?

Evangelism

- When was the last time you were able to talk about God?
- What opportunities to share your faith have there been recently?
- How have you responded to opportunities to share your faith?
- Is there anyone you might invite to consider Christian faith?
- How can we support each other in our Way of Life commitments?

Feedback, corrections, amendments or suggestions for this guide are welcome to
property@methodistchurch.org.uk

If you would like to request this resource in an alternative format,
please contact us to discuss your needs at publishing@methodistchurch.org.uk