

# GUIDANCE ON MAKING PROPERTY APPLICATIONS (January 2024)

## SECTION 1

For applications below the Financial Limits (including **URGENT AND ESSENTIAL REPAIRS**). The Presbytery Property Committee/PBO is your **first line of contact** with regard to any property matter and we are here to advise, support and encourage.

### Question 1

Does the cost of the property work proposal exceed £25,000 (inclusive of VAT)?

If **NO**, go to  
Question 2



If **YES**,  
go to Section 2



### Question 2

Is the work proposed part of a series of works that will take the Total expenditure on that building, including that expended over the three years previous or additional work that is required soon, above the £50,000 Financial Limit?

If **NO**, go to  
Question 3



If **YES**,  
go to Section 2



### Question 3

Is this property proposal an 'invisible' repair or like-for-like replacement? **Approval of Works From** should be submitted to the committee for its information and noting.

If **YES**, you may  
**PROCEED** without  
Presbytery approval



If **NO**,  
go to Section 2



## SECTION 2

### Applications requiring Presbytery Approval (alone)

Making an Application to Presbytery (and to the General Trustees for approval in cases of alteration), or where expenditure will exceed the Presbytery's £25,000 discretionary limit for congregations.

**Have you obtained a copy of the Approval of Works Form for approval of works?** If NOT, then contact the General Trustees resource website or Presbytery Property Committee

[NB: *If the total expenditure in the building concerned does not exceed £50,000 including the present expenditure plus the cost of any works carried out in the preceding three years or likely to be required in the next three years, the Presbytery may itself approve the works unless alterations are involved. If alterations are involved, General Trustees consent is also required. This applies automatically to Audio-Visual proposals, pew removal and such like alterations to places of worship.*]

#### Question 4

Does the cost of the property works proposed exceed £50,000 (inclusive of VAT)?

If **NO**, go to  
Question 5



If **YES**,  
go to Section 3



#### Question 5

Will the cost of the proposed property works take the Total expenditure on that building (not just Presbytery approved expenditure), including that expended over the three years previous, or additional work that is required soon, take the total above the £50,000 Financial Limit?

If **NO**, go to  
Question 6



If **YES**,  
go to Section 3



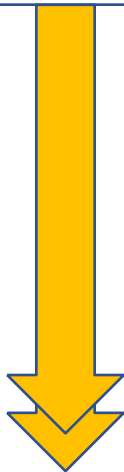
## Question 6

Is this property proposal an 'invisible' repair or like-for-like replacement?

If **YES**, the Presbytery Officers will consider the matter and submit it to the relevant team for consideration and possible decision under delegated powers. Some projects may require to be presented by the Team at the next meeting of Presbytery.

The Session Clerk will be notified by extract minute of the Presbytery as to whether or not approval has been granted.

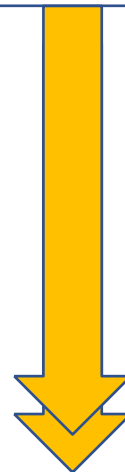
**If approval is granted, you are good to go, but not until the extract minute has been received.**



If **NO**, please note that in addition to Presbytery Consultations as indicated in the adjacent box, approval will also have to be granted by a sub-group of the General Trustees responsible for monitoring.

The Session Clerk will be notified by extract minute of the Presbytery as to whether or not approval has been granted; and by the General Trustees (usually directly) when that body's consent is forthcoming.

When **BOTH** Presbytery Approval and General Trustee Consent is given, work may proceed, but not until then



Whether the answer to Question 6 is **YES** or **NO**,  
please continue with question 7

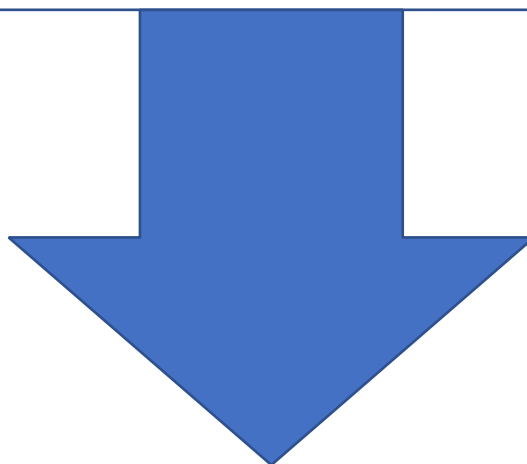
## Question 7

Have you obtained at least three quotations for the works to be undertaken?

If **NO**, then please obtain three quotes, or submit with your application (as above) a detailed explanation of the efforts you have made to obtain the required quotations and any difficulties experienced in obtaining same, together with an opinion as to why you think this is the case.



If **YES**, proceed to populate the **Approval of Works** Application form, and submit same to the Presbytery Property Team via email



Be sure to include an Extract Minute from the Financial Court clearly recording the decision of the local Trustees to undertake the work, and stating the cost of same.

## SECTION 3

### Applications requiring Presbytery and General Trustees approval

Making an Application to Presbytery and the General Trustees for approval in cases of alteration or expenditure above the Financial Limit (£50,000).

#### Question 8

Is this property proposal an 'invisible' repair or like-for-like replacement?

If **NO**, (i.e. there will be alterations) please set out in the **Approval of Works** form as much detail as you can the nature and extent of the proposed work, particularly detailing the nature of the alterations/modifications and why these are deemed desirable.

Photographs of significant features to be removed or altered should be submitted with the application.

Whether **YES** or **NO**, then please submit the **Approval of Works** form, including such details as necessary to help explain what is being proposed, together with supporting documentation (as per section 2) and the declaration required in section 3.

Please submit same (including documentation) to the Presbytery Property Team via email



Submit  
Application  
to Presbytery  
Property  
Team

**Be sure to include an Extract Minute from the Financial Court clearly recording the decision of the local Trustees to undertake the work, and stating the cost of same.**

## What happens next?

The Perth Property Team will consider the proposal and either decide under delegated powers or refer it to Presbytery for consideration. Assuming approval, the application will be forwarded to the General Trustees together with an extract minute advising Presbytery approval, and copied to the Session Clerk.

Any approvals given in these circumstances will be “subject to the concurrence of the General Trustees.” Their concurrence is required in all cases, and they also have a right to withhold approval or offer advice where alterations to buildings are concerned, whether cosmetic or substantial, even where the financial limit is not reached.

**Even if the Presbytery approves the work, work cannot commence until the concurrence of the General Trustees is granted.** This will ordinarily be sent directly to the congregation with a copy to the Presbytery. **When, and only when, that is to hand, work may proceed.**



## **SECTION 4**

### **Some explanations and encouragements.**

#### **FINANCING OF WORKS**

If the application involves significant expenditure the Perth Property Team will carefully consider the financial situation of the congregation. The Team has a duty to ensure that any approval will not have a detrimental effect on the ability of the congregation to meet its obligations towards the national costs of Ministries and Mission (to be replaced by Giving to Grow fund in 2023). A concurrent submission of a Stewardship Plan is likely to aid the path to approval.

The Perth Property Team also require to consider carefully any proposal to apply for grant and/or loans, taking into account the congregation's ability to service loans and any terms or conditions that may be imposed by external grant funding bodies. As with permissions for the works, there may be certain cases where the Team consider it appropriate to refer the matter to Presbytery for consideration.

Applications involving the release of funds held in the Consolidated Fabric Fund (Capital Account) will also require the consent of the Perth Property Team. In the absence of a stewardship proposal they may well take the view that the present generation should make more of an effort to raise funds rather than "spend the family silver". A balanced approach to the release of Consolidated Fabric Fund will be followed, except in cases of unforeseen repairs necessary to preserve the building(s). Local Fabric fund holdings will always be taken into consideration and considered as "available" as a priority over Consolidated Fabric Fund holdings.

#### **LONGER TERM PROPOSALS – DREAMING DREAMS**

In view of the General Trustees stated position, major "Project" expenditure will NOT be approved at this time unless it falls within the permitted categories. The clear issue is whether or not the building(s) concerned are likely to be "retained" under any future approved Presbytery "Mission Plan".

Congregations are nevertheless encouraged to "dream dreams" in planning for mission. The Planning and Implementation Committee would be glad at any time to receive outlines of any works that it is intended will be carried out and the future of a building determined as "secure for now".

This may in fact assist them in determining the strategic importance of any particular building to the essential Mission of the Church.

In thinking proposals through there are some important criteria that must be considered and feature in any outline proposals:

- The General Trustees strategy of retaining or planting "Well-equipped spaces in the right places"
- The "Five Marks of Mission" (as endorsed by the General Assembly) set out in the Mission Plan Act (2021), i.e.

The mission of the Church is the mission of Christ.

1. To proclaim the Good News of the kingdom.
2. To teach, baptise and nurture new believers.
3. To respond to human need in loving service.
4. To seek to transform unjust structures of society, to challenge violence of every kind and pursue and reconciliation.
5. To strive to safeguard the integrity of creation and sustain and renew the life of the earth.

Proposals should seek to demonstrate how the Five Marks of Mission will be advanced or enhanced by what is proposed, and its 'place' within the vision/mission of the congregation in pursuit of these.