



Property
Consents
Management

Getting
Started

The **Methodist** Church 

www.propertyconsent.methodist.org.uk



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Introduction

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After a wide ranging consultation, Conference 2007 agreed that there should be major changes in the way in which we manage our dealings with property:

1. As is the case now, whatever we do with property should support the local **MISSION STRATEGY**. This includes extensions, refurbishments, new builds, sales and purchases as well as maintenance and repairs.
2. For church and circuit property there should be only one decision point beyond the circuit meeting, to give permission to proceed with a property related project. To bring a good understanding of the local environment, challenges and opportunities, **THOSE DECISIONS WILL BE MADE BY THE DISTRICTS**, which will **GIVE CONSENT**.
3. For all other properties, the **Strategy and Resources Committee** will consider property related proposals from boards of trustees, and will **GIVE CONSENT** on behalf of The Methodist Council.

The officers of the Connexional Team and TMCP who currently give support and guidance to anyone with responsibility for Methodist property, will still be available to give support about technical, funding, conservation, legal or payment issues. For those who are confident about dealing with a particular type of project,

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there is no need to involve these officers, except where mandatory, but the support can be accessed at any stage of the project, if required.

Where important documents are required or a specific legal process needs following, it makes perfect sense to get everything checked at an early stage, by the legal officers at TMCP.

In some circumstances, districts will not be able to give consent until connexional officers or TMCP are satisfied about certain aspects of the project.

For example:

1. If your building is listed or in a conservation area, all projects must be reviewed by the conservation officer and receive 'Listed Building or Conservation Area Approval' where appropriate, before receiving final consent. This is a legal requirement that enables decisions to be made by the Church, rather than a secular body.
2. If legal documents are involved, perhaps a sale or purchase, or entering into a lease, TMCP's legal officers must check that essential preparatory steps, such as surveyors' reports, have been taken and that the wording of the documents is correct, otherwise problems might only be spotted at the last minute, causing a transaction to be delayed or cancelled, bringing embarrassment and frustration to managing trustees.

What is the new process?

www.propertyconsent.methodist.org.uk is a private website, accessed by a password, on which you can complete all the necessary details about all projects, including those currently known as 'minor works'.

As the details are on a website, it means that there is a single record of the project and everyone who needs to can see it and be confident that they are looking at the latest (and only) version.

That includes:

- Managing Trustees of all properties
- Superintendent or other circuit representative
- Members of Consent Giving Bodies
- Connexional and TMCP officers

On each page of the website there are prompts about what you have to do next and links to a very full set of guidance notes. Some guidance will tell you about a legal requirement or explain the steps that must be taken and in what order, other notes help you to manage some of the more complicated transactions.

The website is linked to the connexional database and so information already held centrally about your property will automatically be linked to a new project. However, legal documents or technical drawings must still be sent to the 'Consent Giving Body', connexional or TMCP officers by post or email.

Users of the Website

This is a private website and so all users need first to register their email address and other details with the site. User names and passwords will automatically be issued to the superintendent in each circuit and the property secretary in each district.

Other users need to ask the system to create a user account for them. This application needs to be 'authorised' by an authorised person:

- managing trustees: the superintendent
- additional circuit officers: the district property secretary
- additional district officers: the Consent Support Team

When the authorisation has been given, the new user will be allocated a random password which will enable them to use the site.

Whilst it is possible to give a number of people 'read only' authority, normally only one person in each church, circuit or district will be given the necessary authority to update the web pages.

The integrity of the website and the connected database depends upon these security measures and it is the responsibility of all who use the process to maintain proper security over their individual username and password.

Roles and Responsibilities

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Managing Trustees

There is no change, in that managing trustees still carry full responsibility for the successful completion of any projects.

This means employing professionals, when appropriate, to answer key questions such as:

Is this a load bearing wall?

Will this proposal look good and enable disabled access?

Do we need planning permission or just building regulations approval, or neither?

What happens when the lease expires?

Managing trustees can talk to district, connexional or TMCP officers about these questions, who can give helpful suggestions, but it is not their role to give advice on specific issues.

For projects involving legal documents, eg a sale, purchase or a lease, local solicitors will need to be instructed to draw up the paperwork for approval by TMCP. See Help and Guidance for instructions.



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It also means careful preparation before any project is started. This includes thinking about questions like:

Where will the money come from?

What will happen if prices increase or we hit a snag and something goes wrong?

And then seeing the project through to a successful conclusion, remembering that any significant changes to the work or the cost and how it will be paid for, after Consent has been given, must be advised to the Consent Giving Body which will need to give **AMENDED CONSENT**.

The managing trustees are responsible for ensuring that the project is in support of the mission strategy of the Church at both local and national level. If it isn't, the project will not be given Consent. The project record will always require full completion of the supporting pages relating to mission strategy.

In common with all other authorised users of the website, managing trustees have responsibility for its security.

Roles and Responsibilities

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Circuit Meeting

The main role of the Circuit is to endorse each church or circuit project before it is automatically presented to the District for consent. Projects should be undertaken as part of a mission strategy rather than for their own sake because we have the money available. This means testing the mission strategy:

Is it well thought out?

Has it been reviewed recently?

Is it realistic?

Is the project affordable?

Does the circuit support it?

Then there are other practical considerations:

Have the managing trustees sufficient experience to do a good job, or do they need support and guidance?

If the circuit has financial reserves, will it commit some of them to this project?

Does the Circuit therefore endorse this project?

If so, the appropriate section of the web page is completed and the project will automatically be brought to the attention of the Consent Giving Body for consideration.

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Consent Giving Body

The District Synod will appoint a consent giving body to fulfil its responsibilities in relation to property projects. The Strategy and Resources Committee will appoint a similar body.

Recognising that Districts will decide upon their own ways of working, there is no set formula for creating this body. It is suggested that it should include some or all of:

Chair of District

District Property Secretary

District Grants Officer

District Development Enabler

Chair of Policy Committee

The Synod might agree an authorisations structure and that decisions may be made by using email rather than a formal meeting every time, perhaps based upon the cost of the proposed work.

Two of the main questions the Consent Giving Body must answer are:

Is this a good project?

Is it worthy?

This will require proper examination of what is on the website, particularly testing whether the mission strategy dovetails with Church and district policy/plans.

Roles and Responsibilities

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The third question is:

Will it be done properly?

This means testing the design and funding package, whether there are contingency arrangements, and whether the project 'makes sense'. Also:

Is the funding package realistic?

How would managing trustees cope with advance or emergency payments, if necessary?

It is also about testing whether the managing trustees have the combined expertise and experience to see the project through to a satisfactory and well-timed conclusion.

Before giving Consent, this body must consider any guidance given by connexional officers about technical and conservation issues, or grants and external funds being raised, and guidance from TMCP legal officers on legal requirements. In the light of all relevant information available, the Consent Giving Body will then decide whether or not to give consent.

The role of the Consent Giving Body is NOT to give advice relating to structural issues, or whether planning permission is necessary; the managing trustees should appoint local professionals to do that. This body should satisfy itself that proper advice is being taken and will be acted upon.

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Connexional Officers and TMCP

The officers of TMCP and the Connexion have a great deal of knowledge and experience, and are available to give guidance to managing trustees who ask for help; perhaps technical issues to do with building plans or enquiries about funding options.

If a project involves a listed building or conservation area, the conservation officer will automatically be informed about the project to enable a proper consideration of provisions within Ecclesiastical Exemption regulations.

Other officers with expertise about grants, both from within the Church and from outside sources such as landfill, lottery or charitable trusts are available to give helpful information and guidance, as required.

The website will present an opportunity for anyone to seek the help and guidance they feel they need.

The legal officers of TMCP are there to check that all legal documentation is correct and that managing trustees have fulfilled their Charities Act and other legal responsibilities, such as obtaining a qualified surveyors report when selling church property.

In this way, the combined connexional expertise will be applied to larger and more complex projects, rather than every project.

Logging-in

On opening the website, you will be asked to log in. For this you need:

a username, which will be your email address

a password

If you are a superintendent or district property secretary, you will have been sent these details as part of the preparation for 'going live'. Carefully input the correct details, click 'Login' and the website will open for you, displaying the range of projects for which you will be responsible. Superintendents will be able to view all projects within their own circuit, whilst district property secretaries will be able to view all projects within their own district. Similar arrangements will be made for the SRC.

Managing trustees need to apply for login details before they can start using the website. Clicking the 'Register as a New User' link opens up a form which enables them to select the property for which they hold responsibility. Enter personal contact details as requested and click 'Register'.

As part of the security for the website, this application will be automatically referred to the superintendent for authorisation, following which username and password details will be emailed to them.

Once you have logged on to the website, you will either be creating a new project or updating details for an existing project.

Creating a New Project

The process assumes that only managing trustees will create new projects. If you are logged in as Superintendent or district officer or SRC appointee, you will not be able to create a new project.

After clicking on the 'Create New Project Record' button, you will first need to select the relevant property using the drop down menus. If the project is a purchase of a new property you will need to create that property within the database, completing as much detail as you can, before creating a new project for it. All details of this new property may not be known at this time and, of course, the purchase may fall through.

Having selected the property, you then give a description of the project and describe in some detail, the mission strategy of the church or circuit and how this project will support it. Consent Giving Bodies will consider whether that strategy dovetails with wider Church strategy, as they consider your proposal.

Using the Website

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When you 'Confirm' this page, it then creates the Project Record. This will show the Project Summary page and some other pages that are 'greyed out'.

When you select a 'Project Activity', the relevant greyed out pages will be activated depending upon how you answer certain questions or which funding sources you have identified. These additional pages will need to be completed for particular transactions; perhaps details of your professional advisers, or technical, legal or funding details. This step also advises connexional officers and legal officers in TMCP, when a project needs their attention.

Having completed the necessary detailed pages, you complete the authorisation on behalf of the Managing Trustees and the project will automatically come to the attention of all other people who need to be involved at circuit, district or connexional level.

A project record will normally be completed over a period of time, involving several visits to the website. It is important to save the details you have input to any page, before moving to the next, or leaving the website.

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Updating an Existing Project

By selecting from the drop down lists you will be able to find the project record you need to update.

All relevant projects within the nominated status will be displayed at the bottom of the screen. These are 'clickable links' to the project records which will open at the project summary page.

You will be able to select the required pages in this record and update all issues such as funding or legal details, changes in professional advisers or a change to the mission strategy.

You may be updating the project record over a period of time completing certain details as they become available. During this phase, managing trustees can keep the record confidential to themselves, opening it for others to read when they are ready for the next step.

When the district gives consent, several key fields are locked to preserve the data on which the decision was based. If significant changes to the cost or details of the project emerge after consent, you will need to create a new, supplementary project record seeking consent to the changes. By referring to the original project, there will be no need to repeat the mission strategy and other unchanged data.

The Support Team

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Design and production: Methodist Publishing

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