

CHECKING YOUR CHURCH

PROPERTY AND LEGAL MATTERS

This annual schedule, should be used in conjunction with the Supplement checklist during the Summer months for report to and acceptance by the Church Council. This is to enable the information to be checked and an exception report collated for report to the Circuit Meeting.

Please complete all sections and following the Autumn meeting of the Church Council send this Schedule and the Supplement by/...../ to the **Superintendent Minister/Circuit Appointee** who will prepare and send the summary report (Schedule D) to the District in time for the following Spring Synod. Your Schedule A and checklist should be returned for retention in your Log Book.

NAME OF CHURCH COUNCIL	CIRCUIT NAME & No /	DATE year ending 31/08/
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Questions answered in Column 3 will indicate that further action/consideration may be needed in due course. the Schedule and Supplement can be completed electronically by clicking on the box . It will mark it with an X.

1	2	3
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MANAGING TRUSTEES:

1	a	Is the membership of the Church Council (managing trustees) as constituted by Standing Order (613) properly recorded?	Y <input type="checkbox"/>	N <input type="checkbox"/>
	b	Are the names of any below the age of majority noted	NA <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/>

DOCUMENTS:

2	a	Is the property held on the model trusts of the Methodist Church Act 1976?	Y <input type="checkbox"/>	N <input type="checkbox"/>	
	b	Has Trustees for Methodist Church Purposes (TMCP) been informed of properties not held on the Model Trust?	NA <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/>	
3	a	Are all title deeds and other documents relating to property deposited in the circuit safe?	Y <input type="checkbox"/>	N <input type="checkbox"/>	
	b	If "No", please state where kept: - (see Standing Order 903)			
	c	If registered with the Land Registry – Land Registry number			
	d	Have such documents been compared with the register as required by SO 903?	Y <input type="checkbox"/>	N <input type="checkbox"/>	
4	a	Have any agreements or other legal documents been executed during the year?	N <input type="checkbox"/>	Y <input type="checkbox"/>	
	b	If "Y", have all drafts of any such agreements or legal documents been approved by the Trustees for Methodist Church Purposes?	NA <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/>	
5	Where are the following documents deposited?		LOCAL SAFE	CIRCUIT SAFE	OTHER please state
	a	Registration Certificate for Public Worship	<input type="checkbox"/>	<input type="checkbox"/>	
	b	Certificate for the solemnisation of Marriages	<input type="checkbox"/>	<input type="checkbox"/>	
	c	Marriage Register	<input type="checkbox"/>	<input type="checkbox"/>	
	d	Baptismal Register	<input type="checkbox"/>	<input type="checkbox"/>	
	e	Old minute books and other completed books relating to the local Church Council	<input type="checkbox"/>	<input type="checkbox"/>	

NB All old minute books, account books etc should be deposited with the local Record Office. The advice of the Archives and History Committee should be sought (SO015)

LEASEHOLD PROPERTY:

6	a	Is the property, or any part of it leasehold?	N <input type="checkbox"/>	Y <input type="checkbox"/>
	b	If "Y" when does the lease expire?	DATE:	
	c	Are steps being taken to acquire the freehold?	NA <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/>

INSURANCE:			
7	Indicate if the basis of cover is (i) "reinstatement" <input type="checkbox"/> (ii) "indemnity" <input type="checkbox"/> (iii) "first loss" <input type="checkbox"/>		
	What is the sum insured on: (i) the property? <input type="text"/> (ii) public liability? <input type="text"/> (iii) personal accident? <input type="text"/>		
a	Are the premiums paid up to date?	Y <input type="checkbox"/>	N <input type="checkbox"/>
b	Is the insurance cover considered by the managing trustees to be adequate	Y <input type="checkbox"/>	N <input type="checkbox"/>
c	i) Has there been any significant change of circumstance which might influence the assessment of the risk?	NA <input type="checkbox"/>	N <input type="checkbox"/> Y <input type="checkbox"/>
	ii) If YES has the insurer been informed?	NA <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/>
d	Has the insurer refused or restricted cover under the policy?	N <input type="checkbox"/>	Y <input type="checkbox"/>
e	If so has the District been informed?	NA <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/>
f	Has the insurer been informed of use by outside organisations?	NA <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/>
g	Trustee Indemnity Insurance (i) Have you obtained, or are you proposing to obtain, additional trustee indemnity insurance cover over and above the amount of cover currently afforded by the Methodist Insurance Company's Methodist Church Shield Policy	Y <input type="checkbox"/>	N <input type="checkbox"/>
	(ii) If so, have you properly considered the Guidance Notes (on the Methodist website) on the subject and obtained professional advice that such additional cover is prudent and appropriate?	NA <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/>

CHILD PROTECTION:			
8	a	Are any children or young people aged 18 or under ever on the premises?	N <input type="checkbox"/> Y <input type="checkbox"/>
	b	If Yes, is a Safeguarding policy in place?	Y <input type="checkbox"/> N <input type="checkbox"/>
	c	If No to (b) what steps are being taken to implement one?	

LAY EMPLOYEES:			
9		Have the managing trustees any lay employees? (See SO 018 and SO 438A)	N <input type="checkbox"/> Y <input type="checkbox"/>
	a	If 'Y' have the terms of their employment been registered with the District Lay Employment Sub Committee?(SO 570)	NA <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/>

FINANCE:			
10		Have the accounts now presented for the year ended 31st August been audited or independently examined in accordance with Standing Orders 012(3) and 913(2)?	Y <input type="checkbox"/> N <input type="checkbox"/>
11		Has any new liability been incurred during the year on either capital or revenue	N <input type="checkbox"/> Y <input type="checkbox"/>
	a	If "Yes" please give details	
	b	If "Yes", was any security given by way of promissory note, guarantee or mortgage?	NA <input type="checkbox"/> N <input type="checkbox"/> Y <input type="checkbox"/>
	c	If 'Yes' to (b) was the consent of the District obtained?	NA <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/>
12		Has the Standard Form of Accounts been completed, and signed by the auditor/independent examiner?	Y <input type="checkbox"/> N <input type="checkbox"/>
	a	Has any new legacy or gift been received during the year?	N <input type="checkbox"/> Y <input type="checkbox"/>
	b	If "Y", please give details:	
	c	Has it been invested through the appropriate custodian trustee?	NA <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/>
NB All model trust capital must be invested through the appropriate custodian trustee - Normally TMCP.			
13	a	What was the Church Council's agreed contribution to the Fund for Property for the current year?	£
	b	Has the contribution been paid?	Y <input type="checkbox"/> N <input type="checkbox"/>
NB The agreed amount should be forwarded promptly to the appropriate circuit treasurer or direct to "The Fund for Property" c/o the Finance Office, Methodist Church House, 25 Marylebone Road, London NW1 5JR. The Fund is dependent on voluntary contributions to maintain grants			

GENERAL ADMINISTRATION:			
14	Is any part of the premises leased (as opposed to a licence or agreement for occasional use) for other than Methodist purposes?	N <input type="checkbox"/>	Y <input type="checkbox"/>
a	If "Y" was permission obtained from the District as required by Standing Orders and the documentation approved by the Trustees for Methodist Church Purposes	NA <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/>
	i) for the initial lease		
	ii) for the terms of the review/renewal	NA <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/>
b	Is the amount of any rental as advised by a qualified valuer regularly reviewed?	NA <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/>
c	How is the income from any lease used? (give details)		
15	Are there any rights of way, light or air to be preserved?	N <input type="checkbox"/>	Y <input type="checkbox"/>
a	Are the managing trustees protected by an agreement?	NA <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/>
b	Has any annual payment due been received?	NA <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/>
16	Is any part of the property licensed for public entertainments?	N <input type="checkbox"/>	Y <input type="checkbox"/>
a	If "Y", are all the conditions of the licence being met?	NA <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/>
17	Has an Authorised Person been duly appointed under the Marriage Act 1949 and Amendments?	Y <input type="checkbox"/>	N <input type="checkbox"/>
18	Has any application been made during the year to the Charity Regulator or any Government Department or any other public body, or to any Court, in respect of the trust property?	N <input type="checkbox"/>	Y <input type="checkbox"/>
a	If "Y" has the Governance Support Cluster been consulted?	NA <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/>
b	If the Church has registered with the Charity Commission – Charity number:		
19	Are the managing trustees complying with the Data Protection Act 1998?	Y <input type="checkbox"/>	N <input type="checkbox"/>
<i>NB Managing Trustees are reminded that Group Registration through the Trustees for Methodist Church Purposes is intended to cover their needs, so it should not be necessary to have direct dealings with the Data Protection Information Commissioner.</i>			
20	Are the premises used for activities which require a Performing Rights licence?	N <input type="checkbox"/>	Y <input type="checkbox"/>
a	If so, has one been obtained?	NA <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/>
b	Is any material used which requires the permission of the copyright holder?	N <input type="checkbox"/>	Y <input type="checkbox"/>
c	Has permission been obtained?	NA <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/>
21	Have the managing trustees made an annual review of their mandatory Health & Safety risk assessment?	Y <input type="checkbox"/>	N <input type="checkbox"/>
A detailed guidance leaflet is available on the Methodist website and includes potential risks in the following areas amongst others:-			
<ul style="list-style-type: none"> • Property matters including Fire Safety Risk Assessment and Asbestos • The mission of the local Church • Legal issues such as litigation and race/sex/equal rights discrimination • Disaster recovery planning 			

PLANNING MATTERS:			
22	Are there any Town Planning proposals or development plans which might affect the property?	N <input type="checkbox"/>	Y <input type="checkbox"/>
a	Should any action be taken to protect the interests of the trust?	NA <input type="checkbox"/>	N <input type="checkbox"/> Y <input type="checkbox"/>
b	During the last 12 months has the property been listed as being of architectural interest or included in a Conservation Area?	N <input type="checkbox"/>	Y <input type="checkbox"/>
c	If the answer to 22a or b above is 'Y' has the Connexional Conservation Officer been informed?	NA <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/>

QUINQUENNIAL INSPECTION:			
The last Quinquennial Certificate should be consulted before completing this section.			
23	a	When was the last quinquennial inspection carried out?	DATE:
	b	List any works "Of utmost urgency"/"essential within the next 12 months" since receipt of the Quinquennial Inspection which are still outstanding (Schedule G: items 10a and b)	
	c	List any "Matters for further investigation" which are outstanding more than twelve months after the Quinquennial Inspection was received. (Schedule G: item 11)	
	d	When is the next quinquennial inspection due?	DATE:

CONDITION OF THE PROPERTY & BUDGET:		
24a1	Has the Church Council received the Report following the annual inspection of the chapel and ancillary properties? (see the Supplement to Schedule A)	Y <input type="checkbox"/> N <input type="checkbox"/>
a2	What proposals are to be recorded in the church Council Minute book	
b1	Asbestos Did the initial survey, required under the Control of Asbestos Regulations 2006' confirm the presence of asbestos? See updated Technical Guidance Note T12 (available on the Methodist website); also www.hse.gov.uk/pubns/indg223.pdf available as a free download.	Y <input type="checkbox"/> N <input type="checkbox"/>
b2	If "yes", have the Managing Trustees as "duty holders" carried out their management inspection of the asbestos (using the original specialist report as a reference to note changes) and recorded their findings in the church log book?	Y <input type="checkbox"/> N <input type="checkbox"/>
c1	What work has the church undertaken in the last year to reduce its carbon footprint and to reduce energy consumption in line with the Connexional recommendations "Hope in God's Future – Christian Discipleship in the context of Climate Change"	
c2	Has the church completed the energy survey information (see page 7 of Schedule A)?	Y <input type="checkbox"/> N <input type="checkbox"/>
25 a	How much did the Managing Trustees spend on repairs and maintenance during the past year (Standard Form of Accounts)	£
b	How much will the Managing Trustees budget/estimate will be spent, on repairs and maintenance next year including any outstanding matters from the Quinquennial Inspection report referred to at Question 23 b and c above.	£
c	What additional estimated expenditure is planned for improvement/development schemes for your church and ancillary premises over the next 5 years	£
Note: An example of a simple budget proforma can be found on page 66 of the publication "Managing Trustees and Methodist Money" available on the website.		

SIGNATURES:
We confirm that this report was presented to and accepted by the Church Council
.....Chairperson
.....Church Council Secretary
..... Date

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SUPPLEMENT to SCHEDULE A

Property Checklist for Annual Inspections by the Property Stewards

This form is made available in late Spring so that the inspection can be carried out during the light summer evenings. When the report has been completed including any recommendations or proposals, it should be brought to the Autumn meeting of the Church Council where it will be included in the completion/approval of Schedule A.

Name of Church	Circuit Name & No /	Date yr ending 31/08/
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You may find it helpful to refer to our information leaflets on various topics available on our website www.methodist.org.uk or by post.

Questions answered in Column 3 will indicate that further action/consideration may need to be given. This supplement can be completed electronically by clicking on the box . It will mark it with an X.

		1	2	3
The Site & Building Surroundings	Are the boundary walls, fences and gates in good condition?	Y <input type="checkbox"/>	N <input type="checkbox"/>	
	Are paths, steps and ramps in good condition and free from hazards?	Y <input type="checkbox"/>	N <input type="checkbox"/>	
	Are the manhole covers sound and are drains running freely?	Y <input type="checkbox"/>	N <input type="checkbox"/>	
	Are signs/Notice boards in good condition and with up to date information?	Y <input type="checkbox"/>	N <input type="checkbox"/>	
	Are the grounds, surrounding areas and vegetation adequately maintained?	NA <input type="checkbox"/>	Y <input type="checkbox"/>	N <input type="checkbox"/>
	Are any car parking areas safe and in good condition?	NA <input type="checkbox"/>	Y <input type="checkbox"/>	N <input type="checkbox"/>
	Is there adequate provision for wheelchair access?	Y <input type="checkbox"/>	N <input type="checkbox"/>	
	Are there any other external features on which to report?	NA <input type="checkbox"/>	N <input type="checkbox"/>	Y <input type="checkbox"/>
The exterior of the building				
General Structure: Walls	Are the external walls satisfactory?	Y <input type="checkbox"/>	N <input type="checkbox"/>	
	Are there any indications of penetrating dampness?	N <input type="checkbox"/>	Y <input type="checkbox"/>	
	Is the external ground level at least 150mm below damp course level?	Y <input type="checkbox"/>	N <input type="checkbox"/>	
	Are all airbricks clear?	Y <input type="checkbox"/>	N <input type="checkbox"/>	
	Is the building free of timber decay?	Y <input type="checkbox"/>	N <input type="checkbox"/>	
	Is there damage due to vandalism?	N <input type="checkbox"/>	Y <input type="checkbox"/>	
Roof structure and coverings	Are all roof coverings (pitched and flat) in good condition?	Y <input type="checkbox"/>	N <input type="checkbox"/>	
	Are all flashings, edges and junctions satisfactory?	Y <input type="checkbox"/>	N <input type="checkbox"/>	
	Are all roof spaces free of water penetration?	Y <input type="checkbox"/>	N <input type="checkbox"/>	
Rainwater disposal	Are all gutters and downpipes clear and working properly?	Y <input type="checkbox"/>	N <input type="checkbox"/>	
	Are all gullies clear?	Y <input type="checkbox"/>	N <input type="checkbox"/>	
External doors & windows	Are all external doors in good condition?	Y <input type="checkbox"/>	N <input type="checkbox"/>	
	Are all window frames in sound condition?	Y <input type="checkbox"/>	N <input type="checkbox"/>	
	Are there any defective window panes?	N <input type="checkbox"/>	Y <input type="checkbox"/>	
	Are any window guards satisfactory?	NA <input type="checkbox"/>	Y <input type="checkbox"/>	N <input type="checkbox"/>
External decorations	Are all the decorations to woodwork, metalwork, etc., in good condition?	Y <input type="checkbox"/>	N <input type="checkbox"/>	
	Date of last external painting: _____ Date due for next external painting: _____			
The interior of the building				
Ceilings, walls, Partitions & Doors	Are all ceilings satisfactory and in good decorative order?	Y <input type="checkbox"/>	N <input type="checkbox"/>	
	Are all walls internally and partitions etc satisfactory?	Y <input type="checkbox"/>	N <input type="checkbox"/>	
	Are there any signs of dampness and or timber decay?	N <input type="checkbox"/>	Y <input type="checkbox"/>	
	Are all internal doors satisfactory?	Y <input type="checkbox"/>	N <input type="checkbox"/>	
	Are all windows sound and secure?	Y <input type="checkbox"/>	N <input type="checkbox"/>	
Floors & Balconies etc	Are all floors sound and the floor coverings clean and in good order?	Y <input type="checkbox"/>	N <input type="checkbox"/>	
	Are all stairs and steps in good order?	Y <input type="checkbox"/>	N <input type="checkbox"/>	
The Building Services				
Heating System	Is the heating system satisfactory and in good working order?	Y <input type="checkbox"/>	N <input type="checkbox"/>	
	Has there been an annual boiler inspection?	NA <input type="checkbox"/>	Y <input type="checkbox"/>	N <input type="checkbox"/>
	Is the gas installation satisfactory?	NA <input type="checkbox"/>	Y <input type="checkbox"/>	N <input type="checkbox"/>

The Building Services cont/d		1	2	3
	Date of last expert inspection of the gas installation:			
Electrical installation & appliances	Is the electrical installation satisfactory?		Y <input type="checkbox"/>	N <input type="checkbox"/>
	Date of last expert inspection of the electrical installation:			
	Date of last electrical appliances inspection by a 'competent person':			
Kitchen & Sanitary facilities	Are all the kitchen facilities in good order?		Y <input type="checkbox"/>	N <input type="checkbox"/>
	If kitchens are used for food preparation are the requirements of the Local Authority Environmental Health Department being complied with?	NA <input type="checkbox"/>	Y <input type="checkbox"/>	N <input type="checkbox"/>
	Are the toilet facilities and all sanitary fittings clean and in good order?		Y <input type="checkbox"/>	N <input type="checkbox"/>
	Are there adequate toilet facilities for the disabled?		Y <input type="checkbox"/>	N <input type="checkbox"/>
Security, Access, Health and Safety				
Fire Precautions	Are all means of escape maintained and escape routes kept clear?		Y <input type="checkbox"/>	N <input type="checkbox"/>
	Are all exit signs and emergency lighting satisfactory?		Y <input type="checkbox"/>	N <input type="checkbox"/>
	Has any emergency lighting system/fire alarm system been tested?	NA <input type="checkbox"/>	Y <input type="checkbox"/>	N <input type="checkbox"/>
	Are fire extinguishers/blankets kept in position?		Y <input type="checkbox"/>	N <input type="checkbox"/>
	Are fire extinguishers serviced annually by a BAFE company?		Y <input type="checkbox"/>	N <input type="checkbox"/>
	Are all fire Notices properly displayed?		Y <input type="checkbox"/>	N <input type="checkbox"/>
Health and Safety	Has the mandatory Health & Safety Risk Assessment been carried out and reviewed?		Y <input type="checkbox"/>	N <input type="checkbox"/>
	Are there potential hazards for children, elderly and infirm persons?		N <input type="checkbox"/>	Y <input type="checkbox"/>
	Is there an approved first aid kit on the premises?		Y <input type="checkbox"/>	N <input type="checkbox"/>
	Is there an "accident book" for recording accidents?		Y <input type="checkbox"/>	N <input type="checkbox"/>
	Have the Managing Trustees as "duty holders" carried out their management inspection of the asbestos (as required under the "Control of Asbestos Regulations 2006")? See updated Technical Guidance Note T12 (available on the Methodist website); also www.hse.gov.uk/pubns/indg223.pdf available as a free download.		Y <input type="checkbox"/>	N <input type="checkbox"/>
	Is there an "Accident Book" for recording incidents?		Y <input type="checkbox"/>	N <input type="checkbox"/>
Environmental Audit	Has an environmental audit been carried out as a recommended contribution to the Connexional Environmental policy?		Y <input type="checkbox"/>	N <input type="checkbox"/>
Facilities for the disabled	Disability Discrimination Act 1995 (DDA) Has full provision been made to comply with the DDA?		Y <input type="checkbox"/>	N <input type="checkbox"/>
	Have you undertaken an access audit of the premises?		Y <input type="checkbox"/>	N <input type="checkbox"/>
Summary				
Summary of information for report to the Church Council and incorporation into Schedule A questions 24 and 25	Further action relating to answers in column 3 above or any other matters which require attention?			
	What recommendations/proposals should be brought to the next Church council? (Schedule A Question 24d)			
	What building, repair or maintenance work has been undertaken during the year?			
	What has been the cost of this work (Schedule A Question 25a)			£
	What do you estimate will be the cost of repairs and maintenance next year?(Schedule A Question 25b) What additional estimated expenditure do you anticipate is required for improvement schemes to your church and ancillary premises over the next five years? (Schedule A Question 25c)			£
Signed Position held..... Date.....				

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HOPE IN GOD'S FUTURE CARBON FOOTPRINT REDUCTION PROJECT – ENERGY AUDIT

Please state whether figures used are for connexional year or calendar year

Church

	Electricity				Gas			
Supply Number	S				Meter Point Reference Number			
Current supplier								
Fixed term contract?	Yes <input type="checkbox"/> / No <input type="checkbox"/>				Yes <input type="checkbox"/> / No <input type="checkbox"/>			
If contracted - expiry date								
Latest billing period (dates)	From		To		From		To	
Number of day units and price per kwh		Units		p per kwh		Units		p per
Number of night units and price per kwh		Units		p per kwh		Units		p per
Number of evening & w/e units and price per kwh		Units		p per kwh		Units		p per
Daily Standing Charge (if applicable)								
VAT rate on power %			%				%	
Total bill	£				£			

Church hall

	Electricity				Gas			
Supply Number	S				Meter Point Reference Number			
Current supplier								
Fixed term contract?	Yes <input type="checkbox"/> / No <input type="checkbox"/>				Yes <input type="checkbox"/> / No <input type="checkbox"/>			
If contracted - expiry date								
Latest billing period (dates)	From		To		From		To	
Number of day units and price per kwh		Units		p per kwh		Units		p per
Number of night units and price per kwh		Units		p per kwh		Units		p per
Number of evening & w/e units and price per kwh		Units		p per kwh		Units		p per
Daily Standing Charge (if applicable)								
VAT rate on power %			%				%	
Total bill	£				£			

Signed: _____ Position held: _____ Date: _____

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